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ABSTRACT

Assembled in a loose leaf notebook, this collection of independent on-the-job activities is designed to facilitate employee development and intended to help improve an organization's performance appraisal system. The on-the-job development activities described derive from job descriptions, performance appraisal forms, and discussions with job holders and managers. The body of the document is arranged according to eight general headings: (1) initiative/responsibility, (2) human relations/communication, (3) leadership, (4) planning and organization, (5) decision making, (6) administration, (7) selling and marketing, and (8) technology-related skills. Specific performance factors are grouped under each heading, independent of particular job families, in order to allow employees and managers to select developmental activities best suited to individual employees and their unique developmental needs. Each activity includes a brief statement of the purpose of the activity, an explanation of the activity itself (with a suggested time period for completion), and a criterion for evaluating the activity. (Author/ML)

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Directory of Development Activities

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GUIDE TO USING THE DIRECTORY OF DEVELOPMENT ACTIVITIES

The development of employees is important both to employees themselves and to the management of progressive organizations. Improving skills day by day is critical to an employee's motivation, productivity, and career growth, and ultimately to an organization's future. The Directory of Development Activities is a collection of independent on-the-job activities designed to aid in that development.

PURPOSE

Although useful alone, the Directory can also serve as part of the process of performance and development appraisal. A main purpose of this process is to assess an employee's job-related strengths and weaknesses and to formulate a development plan to improve the employee's performance and career potential. The Directory describes activities to be done on the job that build employee competences. Formal learning opportunities such as classroom courses and computer-based education can supplement these on-the-job activities.

The Directory can also help an organization's performance appraisal system by linking specific development activities to the performance appraisal categories in the organization's system. For organizations without a formal system of performance appraisal, the performance factors in the Directory are broadly applicable to most organization environments. In either situation, the Directory can be expected to encourage employee developmental activity that is relevant and important to the performance of the employee's job.

WHAT IT IS

The Directory of Development Activities describes on-the-job development activities that derive from job descriptions, performance appraisal forms, and discussions with job holders and managers.

Of course, the performance appraisal and development planning process for each employee is unique. Thus, the on-the-job development activities must be tailored to fit the needs of each employee and the specific work setting. It may be necessary to restructure an on-the-job development activity for a particular person. Additionally, the stated criteria and time frames may need adjustment to suit the individual's work situation.

HOW IT IS ORGANIZED

The body of the Directory is arranged according to eight general headings (e.g., Initiative/Responsibility), under which specific performance factors (e.g., Self-Development, Effort/Innovation, and Job-Oriented Motivation) are grouped, without regard to particular job families. This format allows employees and managers to look through the entire range of developmental on-the-job activities contained in the Directory for activities best suited to individual employees and their unique developmental needs. The divider pages contain an overview of each section (e.g., Initiative/Responsibility) of the Directory. The development activities under a particular subheading (e.g., Self-Development) are listed with the first page number of that subheading's section.

In addition, the index gives a breakdown of activities by performance factors for major job families found in most organizations. Employees and managers can refer to this index for specific activities suited to their job family. For example, accountants can turn to the section of the index for the job family "Administrative." They can then locate a specific performance factor such as "Work Organization" and read the titles of the 15 developmental activities to find the most appropriate ones. The index also notes the page number for each activity.

Throughout the Directory, the development activities are presented in the same format. Each activity includes:

1. A brief statement of the purpose of the activity.
2. An explanation of the activity itself (with a suggested time period for the completion of the activity).
3. A "measuring stick" or criterion for evaluating the activity.

Here is a sample activity.

PURPOSE OF ACTIVITY	To Improve Setting of Priorities
EXPLANATION OF ACTIVITY	Effective problem solving requires the appropriate setting of priorities. 1. Over the next months, whenever several problems present themselves simultaneously, take a moment to list the problems. Jot down the potential consequences of each of these problems. Rank them according to their priority. Attend to them in this sequence. 2. Present your manager or a colleague with an unordered list of these problems once the crisis is over. Ask them to number these according to their estimate of their priority. 3. Compare your lists and discuss any discrepancies. Be sure to explain your rationale for ordering the things the way you did, and make sure you completely understand the basis for your manager's or colleague's decisions, that is, pay careful attention to the factors that make one problem more urgent than another.
CRITERION FOR EVALUATION	Criterion: Completion of this activity should result in the two lists being consistent with each other.

HOW TO USE IT

The Directory of Development Activities is a resource tool to assist managers and employees in creating effective development plans as part of a performance appraisal discussion. These plans may be aimed either at strengthening performance in areas of relative weaknesses or at making better use of an employee's skills by capitalizing on areas of relative strengths.

Performance appraisal helps managers develop employees. Such appraisals indicate what the employee can do to help the organization by improving current job performance, and what the organization (through the particular manager) can do to help the employee by developing assignments and opportunities on the job that make better use of the employee's abilities and interests.

PERFORMANCE APPRAISAL

The performance appraisal process starts out with manager and employee discussing job responsibilities, key objectives to be accomplished, and how performance will be evaluated. The purpose of the first step is (1) to provide employees with clear understanding of what is expected and (2) to establish at the outset a common framework for evaluating how expectations are met.

The employee and manager should cover three areas during their discussion: (1) overall performance against the work expectations discussed at the beginning of the appraisal period; (2) a diagnosis of performance strengths and weaknesses; and (3) development planning. Development planning is an important part of the discussion, because it takes all the information from the appraisal process and translates it into a plan of action for the future--it becomes a plan for the employee and manager to work on together.

An outcome of the performance appraisal process should be the identification of specific performance factors from the Directory of Development Activities that are important for effective performance on the current job. By also considering the employee's current effectiveness in each of the factors designated to be important, the manager and employee can determine priorities for development activity. In general, development plans should first be formulated for those factors that are relatively high in importance and where employee effectiveness has been relatively weak.

The development activities for each performance factor in the Directory are ordered on a rough continuum from simplest to most advanced. The first activities presented are intended for those employees who have been rated low on the factor or who have had no exposure to the development activities for that factor. The activities presented later are designed for employees who are already strong or have advanced skills in the factor, but who want to maintain that strength or build on it for increased effectiveness.

Development Planning

Once relative strengths and weaknesses have been determined, the manager and employee should construct the actual development plan and record it so that the plan becomes an active commitment. A development plan should be constructed from specific recommendations for improving the identified weaknesses and making better use of the strengths. The Directory can be consulted to assist in this step.

The Directory fulfills the same general function for recommendations to address strengths and weaknesses. If the factor is a relative strength, and an activity is desired, the manager and employee should refer to the end of the list of development activities for suggestions on how to make better use of strengths.

If the factor is a relative weakness and an activity is desired, the manager and employee should first estimate the extent and type of weakness. Then, the manager and employee should scan the list of goal statements for activities that match the need in content and difficulty. (Remember that these activities are ordered on a rough continuum from simplest to most advanced.)

Generally, the development activities selected should be completable on the job, and should be incorporated into ongoing work assignments whenever possible. For instance, a planning exercise may be applied to the next work project encountered, or a communication suggestion may be applied to memos or reports written in the normal course of work.

Primary responsibility for making a development plan may fall with either the manager or the employee, depending upon the situation and type of employee involved. However, whatever approach is used, the key element is that both the manager and employee must agree on the plan.

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INITIATIVE/RESPONSIBILITY

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- Keeping physically and emotionally fit
- Establishing career goals
- Acquiring new skills and knowledge
- Increasing self-confidence by overcoming weaknesses and practicing assertive behavior

B. EFFORT/INNOVATION

- Demonstrating enthusiasm toward assigned and additional responsibilities
- Accepting, anticipating, and capitalizing on change
- Becoming open to creative and innovative approaches

C. JOB-ORIENTED MOTIVATION

- Taking responsibility for basic job assignments with minimal supervision
- Avoiding blocks and frustrations that lead to procrastination
- Improving ability to meet goals and deadlines
- Increasing the work pace and a flexibility regarding work hours

D. ATTENDANCE AND PUNCTUALITY

- Arriving and leaving work at the proper time
- Using breaks and sick leave appropriately
- Decreasing absences by maintaining good physical and emotional health
- Increasing presence at the work station
- Minimizing distraction of other employees

E. ORGANIZATIONAL AND JOB COMMITMENT

- Accepting the organization's overall goals, values, and policies
- Developing an awareness of the relevance of the individual's job
- Expressing a willingness to assist others and utilizing slack time to the best advantage
- Increasing job satisfaction

F. QUALITY OF WORK

- Establishing work standards
- Improving accuracy, neatness, clarity, and overall quality of work assignments
- Maintaining and capitalizing on high standards

G. **ORGANIZATIONAL EFFECTIVENESS/INTERFACE**

- Identifying objectives, functions, and resources of the organization
- Understanding organizational policies and regulations
- Selecting and utilizing effective communication channels within the organization
- Adapting to changes in procedure

DEVELOPMENT ACTIVITIES

A. SELF-DEVELOPMENT

To Improve Physical and Emotional Health 1

To Clarify Career Goals 1

To Improve Your Assertiveness Skills 1

To Acquire and Apply New Skills 1

To Improve Know-How Through Course Work 2

To Broaden Technical Knowledge 2

To Develop a Routine for Keeping Up-to-Date 2

To Overcome Weaknesses in Technical Areas 3

To Identify Potential Technical Resources 3

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To Improve Physical and Emotional Health

Healthful functioning is a prerequisite to job motivation. Less than optimal physical functioning or emotional concerns can seriously affect one's job performance.

1. If you have not had a physical examination in the last 12 months, schedule one within the month and follow the doctor's recommendation on exercise and diet.

2. If you are not already doing so, begin a program of regular physical exercise tailored to your particular physical needs. Investigate a good health maintenance program as a means for defining your physical needs and instituting lifestyle changes.

3. If emotional problems are interfering with job performance, identify sources of stress and take action in alleviating them. Do not be ashamed to seek assistance; admitting a problem is an indication of good mental health.

Criterion: When you have identified and taken steps to remedy physical or emotional problems that are affecting job performance, you will have met this objective.

To Clarify Career Goals

A sense of stagnation and the feeling that you are "going nowhere" can often lead to a lack of effort on the job. Developing clear-cut career goals and keeping these goals constantly in mind can give you the incentive to put forth extra effort on the job.

1. Investigate alternative career paths for yourself through discussions with your manager and other individuals.

2. Formulate a tentative long-range career goal based on these discussions.

3. Establish in writing what steps you will need to take and what attitudes you must have in order to achieve this goal.

4. Develop an alternative or "second best" career goal.

5. Contrast the different subgoals you must achieve in order to attain either of these ultimate career goals.

6. Establish short-range goals based on the longer-term career goals you have tentatively established. For example, determine where you would like to be by the end of the next five-year period and what steps you will have to take in the interim in order to achieve this goal.

7. Prepare a timetable for achievement of this short-range goal.

Criterion: If this exercise has helped you clarify both short-range and long-range career goals, you should be able to approach your work with renewed enthusiasm and increased effort.

To Improve Your Assertiveness Skills

Learn to stand behind your ideas and suggestions; do not be dissuaded by a less-than-positive response.

1. Be prepared to defend your position rather than just saying it.

2. Over the next month, keep a record of occasions where you backed down prematurely. Determine if this is a characteristic means of dealing with conflict. If so, ask your manager for the opportunity to role play assertive situations, perhaps by having the manager play "devil's advocate."

Criterion: When you have successfully defended your position on two occasions where you would formerly have backed down, you will have completed this suggestion.

To Acquire and Apply New Skills

By showing an interest in acquiring new skills and then seeking ways of applying these skills to the job, you display to your manager your willingness to exert more than the minimal, or "expected" amount of effort and, in the process enhance your possibilities for career growth.

1. Prepare a list of skills which, while not required in your job, might make you more useful if you possessed them.

2. Develop plans to acquire one or two selected skills from this list. For example, you might investigate the availability of either internal seminars or courses in local colleges.

3. Discuss your plans with your manager and ask if they feel it would be to your advantage to acquire such skills. Discuss specific new responsibilities you might assume if you acquired these skills.

4. Follow through on your plan.

5. Let others know of the efforts you are making toward self-improvement.

6. Seek out opportunities to use your newly acquired skills on the job.

Criterion: Review your progress at the end of 6 months. If the self-improvement efforts you have undertaken have proven successful and if others are aware of these efforts, it is likely that you will be more and more frequently called upon when situations arise where the skills and knowledge you have acquired are needed by others.

To Improve Know-How Through Course Work

With knowledge increasing at a fantastic rate, we are losing ground by standing still. In order to keep up-to-date continue to enroll in relevant courses and seminars.

Over the next several months:

1. Enroll in a course or seminar related to your field of expertise or to general management knowledge.

2. Familiarize the instructor with your particular needs and interests so that they can be taken into account if possible in teaching.

3. Submit a written report to your manager upon completion of the course or seminar.

4. Outline what you learned from the course or seminar and emphasize specific ways you think you can apply this knowledge to on-the-job situations.

5. Maintain a file of written summaries on courses and seminars you attend so they can be referred to later if you are asked for your recommendations on format training possibilities for other employees.

6. Check with your manager 3 to 6 months later to discuss to what extent you are still applying this knowledge.

Criterion: If the courses and seminars you attend are serving their purpose, you will find that you are not only better able to cope with new and expanding requirements of your own job, but that you are also better able to communicate new information and developments to others.

To Broaden Technical Knowledge

Increasing your technical knowledge can help you better understand how your own job fits into broader organizational activities.

1. Ask your manager to recommend a magazine or journal that covers technical areas with which you are relatively unfamiliar but have a direct bearing on broader organization activities.

2. Plan to read at least one article per week from this source over the next 3 months. Each article should deal with a topic with which you are unfamiliar.

3. Prepare a brief written summary of each article on a file card.

4. Start a file system by topic of these cards.

5. Review these cards periodically to determine if there are ways in which the information can be applied in a modified form to on-the-job situations.

Criterion: If your reading program is serving its purpose, you will find that you are now better able to see the interrelationships between your own job and activities of the organization as a whole.

To Develop a Routine for Keeping Up-to-Date

Because you are working in a society where new developments are occurring at a tremendous rate, it is particularly important to establish a routine for keeping up-to-date.

1. Consult with your manager regarding course work you could take.

2. Arrange a meeting with your manager and several of your co-workers. Focus the meeting on generating a list of topic areas in which development and maintenance of know-how is most critical for effective performance within your organization.

   a. Find out whether any of your co-workers are more informed than you are about any of these topics. If so, ask them if they would be willing to assist you in your efforts to become more up-to-date in these areas.

   b. Find out what resources your co-workers have found useful in keeping informed about each of these topics.

   c. Find out whether there is any interest in holding organizational technical sessions on a regular basis.

   d. After the meeting, compile a written outline of the critical topics and the resources (including co-workers) available for building your familiarity with each of them.

3. Develop a concrete plan of action to follow in improving your know-how.

   a. Consider such alternatives as: forming an informal study group with several of your co-workers and having each member take responsibility for keeping the group informed on a particular topic area; pursuing a systematic sequence of readings, including periodic rereading of basic manuals, and building a file of notes on each of the initial topic areas; or arranging a series of meetings with individuals both inside and outside the organization who are experts on critical topics.

   b. Discuss this plan with your manager to find out how effective they believe it will be in improving your overall know-how, and how it might be made more effective. Revise your plan in accord with their suggestions.

4. Meet periodically with your manager to discuss your progress in improving your know-how.

Criterion: You will have accomplished this goal when you are confident that you have developed a routine for acquiring and retaining familiarity with critical topic areas.

To Overcome Weaknesses in Technical Areas

If you believe yourself to be weak in a technical area, it is important that you seek further exposure to this area in order to build your familiarity and competence.

1. Meet with your manager to discuss the technical areas in which you are weak and could benefit from additional exposure.

   a. Ask your manager to include you in a project that allows you to concentrate on development of this technical knowledge.

   b. Ask to have an experienced co-worker "shadow" your efforts in this technical area and give you periodic feedback on your effectiveness.

   c. Schedule periodic follow-up meetings with this co-worker and/or your manager to discuss your progress and to work through snags you are encountering.

2. Have your manager recommend a worthwhile magazine or journal covering some or all of the technical areas with which you are relatively unfamiliar.

   a. Plan to read at least one article per week from this journal.

   b. Make notes on the article and prepare a brief written summary on a file card. Start a file system, organizing your file cards by topic.

   c. Re-read these file cards before your follow-up meetings so that you can use these meetings to discuss the articles you read during that period and raise any questions you might have.

Criterion: You will have accomplished this goal when you can honestly claim competence in the technical areas in which you initially were weak. Use the feedback from your "shadow" as a major index of your progress.

To Identify Potential Technical Resources

Being aware of available resources is an important first step toward increasing your level of technical know-how. These resources may include books, periodicals, courses, seminars, and individuals either inside or outside the organization.

1. Prepare a list of technical topics that you are required to deal with on the job.

2. Prepare a list of potential technical resources from which you can acquire information related to these topics. Make this list as complete as possible based on your present awareness of available resources.

3. Ask your manager and/or colleagues who have a reputation for being technically up-to-date for their opinions as to the relative worth of the resources you have listed.

4. Ask your manager and/or colleagues to contribute to your list any resources they believe should be included.

5. Develop a plan of action to follow over the next 3-month period in improving your know-how based on these discussions. This might include, for example, regular reading in a particularly well regarded technical journal.

Criterion: If you have been successful in identifying technical resources, you will find that you will be able to more readily locate information that you want and need and, as a result, will be performing your job more efficiently. In the process, you will also be expanding your level of technical know-how.

To More Actively Seek and Utilize Feedback About Your Job Performance

Employees lacking confidence in their ability to perform required work may have difficulty in handling criticism. Fear of an inability to develop or advance in an area that has been pointed out as weak may block receptiveness to advice.

1. Select one area in which you feel you have justifiably received criticism.
2. Develop at least one idea as to how you could build up your skill in this area. The suggestions you develop are to be added to advice received from your manager.
3. Specifically ask for advice if there is none evident in the criticism.
4. Write out, in point form, suggestions for work improvement gained through critiques.
5. Record comments in a notebook assigned for this purpose.
6. Review the notebook at the beginning of each workweek to ensure that advice will be acted on during the upcoming week.
7. When comments from your manager indicate improvement in the selected area, repeat the preceding procedure choosing another area in which you have received criticism in the past.

Criterion: Once you feel confident in accepting and acting on constructive criticism received on the job, you will have mastered this exercise.

DEVELOPMENT ACTIVITIES

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To Increase Initiative

Learning to confidently take some initiative is important to your future career growth.

Within the next few weeks:

1. Sit down with your manager and examine all that you do in the day-to-day performance of your job.
2. Look for areas in which you typically go to your manager for a decision.
3. Determine the decisions for which you could begin taking responsibility.
4. Be sure you understand all the elements your manager considers before making a judgment. Then, with the approval of your manager or the decision-maker, begin to take over that decision-making factor yourself.
5. Set a meeting with your manager for some time in the future after you will have had the opportunity to exercise your new decision-making authority. Try not to seek encouragement from your manager before that time (but use your judgment here, obviously in some cases it will be important to consult with your manager). Review your decisions with your manager. Look for new ways in which you might take decision-making responsibility.

Criterion: As you become more confident in this area, you should be relying less and less on the encouragement and approval of your manager before making a decision.

To Capitalize on High Work Energy

By working so diligently and energetically you are more likely than most of your co-workers to find yourself with some time to spare toward the end of the workday or week. It is important that you take the initiative in filling this spare time with productive, interesting work activities so that you do not end up becoming bored and disatisified with your job.

1. Consider the following three suggestions for filling your time productively and then generate your own plan, tailored to your specific situation, needs, and interests.
2. Develop a list of all the projects currently underway in your organization.
    a. Find out what phase each of these projects is in and what work remains to be done.
    b. If any of this remaining work interests you, or seems to present an opportunity to you to develop new skills, meet with that project leader and your manager to see whether you might devote a certain number of hours each week to assisting in the completion of that work. (Be sure you do not volunteer so many hours you put a strain on your ability to complete your regular work.)
3. Whenever you find yourself ahead of schedule on your work, make use of this opportunity to consider alternatives to the methods or approaches you have adopted and/or to strive to anticipate unforeseen changes that might occur that could affect your future progress.
    a. Keep a record of the ideas that occur to you during these periods so that you may return to, and further explore them in the future.
4. Inform your manager or project leader of your efficiency in handling your current workload.
    a. See whether you could be given more challenging assignments in the future.
    b. Ask for suggestions as to additional tasks you could currently undertake.

Criterion: When you have implemented a plan that keeps you working at peak efficiency during the periods when you were previously threatened with boredom, you will have accomplished this task.

To Capitalize on High Work Energy and Ingenuity

It is important that you appreciate the benefits that your high work energy and ingenuity allow you to bring to the organization as a whole. That is, if you have been restricting your ingenuity primarily to improving the progress of only your own projects and assignments, you should give some thought to the ways in which other people in the organization might benefit from your creative efforts. Use the three suggestions briefly listed below to spur your own creativity in coming up with ways you can contribute more broadly to your organization's effectiveness.

1. List the innovations that you have implemented in your own work methods and approaches as well as the benefits you have realized from these innovations.

   a. Describe these innovations and their effects to co-workers who are still using work methods and approaches similar to your old ones.

2. Devote some attention to identifying obstacles and snags that commonly occur in the progress of projects within your organization.
   a. Remember that some such snags may be so common that they are accepted as inevitable by many of your co-workers. Thus, you may have to think of creative ways to approach this search.
   b. Once you have identified a few such common obstacles and snags, put your ingenuity to work in generating novel approaches for preventing or overcoming them.
3. Conduct some brainstorming sessions with co-workers who are interested in learning to think more creatively.
   a. If you focus the sessions on generating solutions to problems that currently face these co-workers, you will serve the dual purpose of modeling your own creative thought process while simultaneously aiding in the development of innovative problem solutions.

Criterion: When you have developed and implemented a plan through which you are putting your energy and ingenuity to work in the service of the organization as a whole and you can honestly claim some success in improving the performance of others in the organization, then you will have truly accomplished this goal.

To Capitalize on Strengths in Effort

Capitalize on your strengths in this area by seeking out assignments that you know will require a good deal of extra effort to successfully complete.

For example:

1. Discuss with your manager major changes that you would like to see either within your organization or the organization as a whole within the next few years.
2. Take the initiative and develop your own plan for how this change could be accomplished over the next few years.
3. Specify how present obstacles could be overcome.
4. Develop a tentative timetable for implementation of your plan.
5. Review this plan with your manager to determine its feasibility.

Criterion: Undertaking at least one activity of this nature by the end of the next 6-month period will indicate completion of this suggestion.

To Capitalize Upon Strong Motivation by Seeking New Challenges

If you are seen as a highly motivated worker, you can capitalize upon this strength by looking for additional challenge in your work.

1. Let others (especially your manager) know that you are seeking additional challenge and discuss projects that you might undertake. For example, if a new piece of equipment is coming on the scene, you could volunteer to familiarize yourself with the equipment and to brief the other customer engineers either orally or in writing.
2. Write out a plan for undertaking such an assignment. Include a rough timetable breaking the task down into its components and indicating exactly when you will have completed each subtask.
3. Obtain whatever approval of your plan is necessary.
4. Use the timetable to monitor your progress toward your goal as you implement your plan.

Criterion: At completion of the task, obtain feedback from your manager and/or co-workers about your performance, consider your own feelings about the value of the experience, and explore possibilities for additional challenges.

To Assume Additional Responsibilities

If you sense an element of boredom in your work and feel that the job lacks challenge, seeking out opportunities to take on additional responsibilities can serve at least two purposes. First, it can help give you a better attitude toward the content of your job. Secondly, the organization will benefit by virtue of the fact that you are more broadly utilizing your talents.

1. Pay close attention over the next 2 weeks to the day-to-day job activities engaged in by individuals in your unit or organization.

2. Chat informally with these individuals about how they perceive these activities. For example, what aspects of these activities do they particularly like or dislike? Why? Do they find the activities challenging?

3. Prepare a list of additional responsibilities you believe you could take on based on your observations and discussions.

4. Present this list to your manager. Determine jointly if one or more of these responsibilities (or others not on your list but suggested by your supervisor) could be added to your job duties without interfering either with your present work or the work of others within your unit or organization.

Criterion: If you seek out and accept additional responsibilities, it is likely that the boredom and lack of challenge that you previously experienced will have been substantially reduced.

To Avoid Boredom and Develop More Enthusiasm in Carrying Out Tasks and Assignments

If you sense an element of boredom in some tasks and assignments, your feelings are likely to be apparent to others in the way you approach such tasks and assignments. While you may not be able to change your feelings about the content of a task or assignment, it is at least possible to change your approach to it. Over the next 2 weeks:

1. Make a list of all the activities you perform on a regular basis. Separate these activities into those you enjoy doing and those that contain a certain element of boredom.

2. Analyze your work schedule to determine how you distribute your time during a typical day.

3. Consider rearranging your work day (to the extent that this is possible) if you find that you are spending a large block of time on relatively uninteresting tasks.

4. Try alternating tasks you enjoy with tasks that are of relatively less interest to you, rather than spending a large block of time on the latter.

5. Set aside one of your more productive time periods for those tasks that are of least interest to you. If you already perceive a task as being boring, mental fatigue can only make it seem more unpleasant to tackle.

6. Analyze at the end of the 2-week period to what extent rearranging your work day is helping you approach tasks with more enthusiasm.

Criterion: If you have become somewhat more enthusiastic about carrying out relatively uninteresting tasks and assignments, you will know that this has been a worthwhile activity.

To Increase Enthusiasm By Developing Interests Outside of Work

Lack of motivation in your work may be part of a vague sense of dissatisfaction with your life in general. If you feel you are in a rut but cannot really put your finger on what the problem is, developing your skills in an area of interest unrelated to your work may revive your enthusiasm in every aspect of your life.

1. Explore the educational and recreational opportunities available in the community.

2. Choose an area of interest unrelated to your work.

3. Enroll in a course or take lessons in that area.

Criterion: If you feel less dissatisfied with your life in general and can approach your job responsibilities with greater enthusiasm, you will have met the requirements of this developmental suggestion.

To Set Challenging Goals and Exert More Effort Than Required

Putting forth an average amount of effort may often be sufficient to get the job done. However, striving to attain goals beyond the expected and showing a willingness to exert more effort than is actually required will be a sign to others that you are eager for increased responsibilities and growth. This is particularly the case where the extra effort will require some amount of personal sacrifice. Accomplishing challenging goals is also likely to provide you with a greater sense of personal satisfaction.

Over the next 3-month period:

1. Volunteer to take on an assignment that you know will require a good deal of extra effort as well as persistence in overcoming difficult obstacles. In particular, this assignment might involve proposed changes in which you and others have expressed an interest but where general agreement was that any change would be too formidable and time-consuming an undertaking.

2. Develop your own plan for how this change could be accomplished with the involvement of yourself and co-workers.

3. Develop a tentative timetable for implementation.

4. Review this plan with your manager to determine its feasibility. If endorsed by your manager, throw yourself wholeheartedly into its implementation.

Criterion: The feedback you receive from others on the effectiveness of your plan will be your measure of success in capitalizing on your strengths in Effort/Persistence.

To Improve Low Work Energy, Drive, and Initiative Through Prioritizing

A major contributor to any individual's willingness to work hard on a job is their sense that the job is important. If you can build your appreciation for the worth of your job, you are likely to find yourself taking a much more professional approach to your work.

2. Make a list of all the varous duties you perform.

   a. Categorize the duties roughly into high, medium, and low importance.

   b. Review the list with your manager or a senior co-worker, and compare your list with the job description for your position, until you are satisfied that you have developed a reasonably comprehensive list of duties.

2. Think about the importance of each of these duties: for each duty you have listed, write out one potential consequence of poor performance and one possible consequence of above average performance.

   a. Meet again with your manager or senior co-worker to review this list of consequences.

   b. Use it as a point for a discussion of how your work contributes to the overall functioning of the organization.

Criterion: When you find that as you are working on various tasks you are considering the importance they have to the project, the organization, and even the corporation as a whole and thus you are striving to do your best possible work, you will have accomplished this goal.

To Improve Low Work Energy, Drive, and Initiative Through Job Satisfaction

The amount of energy, drive, and initiative you display on the job will be influenced by the amount of satisfaction you derive from your work. Since the determinants of job satisfaction are unique to each individual, only you can decide how to organize your work so that it is maximally satisfying to you and, thus, so that you are willing to put forth maximum effort.

1. Write a description of the job that you imagine to be the ideal job for you.

   a. Include a description of such characteristics as: the major responsibilities you would have, the types of projects you would work on, the skills it would require, the nature of the relationship you would have with your co-workers and manager, the amount of contact you would have with customers and/ or clients, and so forth.

   b. Then, following a format similar to the one above, map out a description of your present job.

   c. Compare the two job descriptions to single out those areas that are most in conflict with one another.

2. Prepare various strategies to bring your actual job more into line with your ideal. These strategies should incorporate only modifications that can be made without reducing your effectiveness in meeting the basic job requirements.

   a. For instance, if your job is becoming boring for you, generate a list of added responsibilities you think you could take on or rearrange your work schedule so you do not do things in the same pattern day after day. Or, if you enjoy one aspect of your work more than another, it might be possible to have your manager or project leader rearrange your work assignments so that you spend relatively more time on the activities that give you more pleasure.

   b. There are, of course, limitations to how far you can go in modifying the nature of your job, however, within these limitations, you should find it possible to come up with some rather creative remedies.

3. Meet with your manager to discuss the feasibility of the changes you would like to make in your job activities.

   a. Be sure to explain why you would like to make each of these changes and what effects you would expect them to have on your energy, drive, and initiative on the job.

   b. When your ideas are not feasible, see whether your manager can suggest any viable alternatives.

   c. Implement the viable changes.

4. Meet periodically with your manager to discuss the extent to whether your energy, drive, and initiative have increased as you expected.

Criterion: When both you and your manager can see a noticeable improvement in the amount of effort and initiative which you are expending on the job, you will have accomplished this goal.

To Become More Comfortable With Change

Rapidly expanding technology makes change inevitable in the work environment. However, one can cope more constructively with change if they have first dealt with their insecurities and negative feelings.

Over a 2- or 3-week period:

1. Review your work history. List all the major changes you have encountered and have had to deal with in past jobs. Record the nature of the change, how you responded, and the consequences of your actions in the face of this transition.

2. Review this list and perform a step-by-step analysis of your past encounters with change. Try to pick up clues from the entries regarding the development of your present attitude toward change. Have your past experiences been of a negative nature so that you have lost some of your confidence in your ability to cope with new situations: Were you more open to change early in your work history and then became more rigid as your experience increased?

3. Try to determine if a general pattern of response to change emerges in the entries. Do you characteristically react in the same way? How successful has this pattern of response been in terms of the listed consequences?

Criterion: Completing this exercise will not automatically make you more enthusiastic about changes that take place in your work environment. However, it will force you to look at the reasons behind your insecurity with change and some of the possible negative consequences of an inability to adapt to change. If this exercise has been worthwhile, you will find you are better able to adapt to change that occurs in the future.

To Anticipate Change by Keeping Up-to-Date With Technical Literature

To anticipate possible change in the work environment requires that you keep up-to-date with the technical literature in your area of expertise.

1. Design a reading program with the assistance of your manager that will be geared toward broadening your technical knowledge. In particular, this program should include readings that present the most recent advancements in your technical area.

2. Plan to devote some time each day to this reading over the next 6 months.

3. Take notes on your readings, particularly when material strikes you as being unusual or innovative.

4. Maintain a reference file of these notes. In this way, the innovative ideas you noted can perhaps later be incorporated into proposals or plans.

5. Periodically review to what extent your technical reading has made you better able to anticipate changes in your work environment.

Criterion: If the reading program you are following is appropriate, you will discover that the information you gain from your reading is helping you to more often foresee change before it occurs and must be dealt with.

To Anticipate Change by Keeping Informed of Activities Outside of One's Own Specialty

Change is usually easier to adjust to when you have been able to anticipate it. However, in order to anticipate change in the work environment, it is essential to keep up with developments that may ultimately have an impact on your own job.

Over the next 6-month period:

1. Seek out opportunities to communicate regularly with people both inside and outside the organization whose research either directly or indirectly may affect your work.

2. Try to find time to visit other units or organizations to broaden your exposure to different areas and to learn more about their specific functions.

3. Read thoroughly all internal publications in order to obtain a broad view of happenings within the organization.

4. Volunteer to set up a luncheon or an information exchange meeting to "cross-fertilize" knowledge among your own and other units.

Criterion: Upon reviewing your activities over this 6-month time span, you should find that you have a better understanding of how your work fits in with overall organizational goals and objectives and that you have been better able to anticipate some of the changes that have occurred during that time.

To Become More Willing to Take Risks

Innovation is usually risky. Occasional failures must be accepted with some equanimity, since going-out-on-a-limb more often will, in the long run, result in more innovative solutions to old problems. Efforts to improve risk-taking should begin with relatively small projects for where the impact of failure is not too great.

1. Request the opportunity to become involved in an innovative project whose failure would have a minimal impact on operations within your area.

2. Seek more initial guidance from your manager than you ordinarily would in order to better ensure the project's success.

   a. Identify and assess risks.

   b. Work out an implementation plan with a rough timetable, and review this with your manager to determine if modifications are necessary.

   c. Determine which decisions can be made independently and which decisions must be referred to your manager.

3. Discuss progress with your manager at mutually agreed points in time during the course of your involvement in the project.

Criterion: If you are improving your risk-taking abilities, you will find that you can more confidently undertake subsequent projects where the impact of failure would be somewhat greater.

To Become More Innovative by Developing Broader Reading Habits

Very few innovative people have truly original ideas--they usually pick them up from somewhere else. If your reading has been rather narrow, tried-and-true work procedures and problem solutions are probably relied upon with little thought given to the creative.

1. Design a regimen of readings with the assistance of your manager. Place particular emphasis on periodicals from areas you are relatively unfamiliar with so that you can learn about different facets of your job.

2. Devote a specific amount of time each day to your reading program over the next 6 months.

3. Prepare a short review of each reading that is likely to be useful to you in the future.

4. Maintain a file by topic of these reviews so that you later have ready access to them.

5. Maintain a written record of instance in which you apply innovative solutions to problems using the knowledge and information you have gained from your reading.

Criterion: If innovations stimulated in part by your broader reading have met with a favorable response from others, you will know that your reading program is serving its purpose.

To Create a Climate of Innovation

Creating an innovative climate requires that ideas can be generated without fear of immediate negative judgment. Perhaps you have had ideas or suggestions that you were reluctant to voice because people might consider them impractical or foolish.

Use a blackboard or post a bulletin board with a column entitled, "half-baked ideas." Meet weekly or monthly to discuss the suggestions. When instituting change, start small and allow time for assessments before making irrevocable decisions.

Criterion: When you have implemented a technique for generating ideas and arranged to meet at least monthly for discussion, you will have accomplished this suggestion.

To Loosen Blocks to Creativity

Sometimes being unable to loosen your mental processes enough to come up with new ideas is the block to creativity. Following is an exercise designed to promote flexibility in thinking. It should take about 20 minutes (although you might wish to ponder the results longer).

1. How many good ideas do you have to the following problems? Limit yourself to good ideas and do not put them down unless they are really good.
   a. List all the good uses you can for an ordinary kitchen broom. (3 minutes)
   b. You are the owner of a downtown building. There is only one doorway through which everybody enters and leaves at noontime. What good and completely satisfactory ways can you think of to alleviate this problem? (3 minutes)
   c. In order to aid the U.S. Government, conduct a public relations program; list all the good ideas you can think of that the average person could do to help a visitor to this country better understand and appreciate the U.S. (3 minutes)
2. Total the number of good ideas you have for the three problems. What do you think of your ideas? Were they original or were they the kind anyone could think of? In limiting yourself to good ideas, how many did you have that you did not list? Did you omit them because they were too expensive, academic, or just too "far out"? In this example, observe how cautionary reasoning acts as a brake in making full use of your imagination.
3. Now give yourself 3 minutes for each of the following problems. Only this time, list every idea that comes to you--wild or mild, good or bad.
   a. List all the uses you can think of for a used plastic belt from a dictating machine. (3 minutes)
   b. You live on a corner lot and people keep walking across the grass, spoiling the lawn. What are all the things you can think of to solve this problem? (3 minutes)
   c. List all the ways you can think of to help yourself learn more about people in foreign lands. (3 minutes)
4. Again, write down the total number of ideas. Ask yourself the same questions as you did in the first set. Are there a few more original ideas? Are some of them potentially good ideas?
5. Dr. Alex F. Osborn, founder of Creative Education Foundation and author of Applied Imagination, likens trying to produce ideas while you judge them to driving a car with the brakes on. He adds, however, that if we are going to equip a car with a more powerful motor (imagination), we should also equip it with stronger brakes (evaluation).

Criterion: Completing the exercise meets the requirements of this suggestion.

To Become More Innovative

It is almost impossible to be innovative and critical at the same time. Critical thinking tends to stifle innovation because novel ideas usually seem ridiculous at first glance and, hence, will be rejected as unrealistic before they are fully developed. When you are encountering obstacles to your normal work methods or approaches, and need to generate new or improved procedures, it is important to let yourself be innovative at the expense, temporarily, of being critical and analytic.

1. Whenever you encounter a major obstacle to progress within your current work method or approach, generate as many solutions as you possibly can before starting to evaluate them.
    a. First, define the problem that is stopping you from progressing; state the problem in the most general terms possible. This will help you to avoid getting locked into any particular perspective.
    b. Set aside a period of time (30 to 60 minutes) in which you will do nothing but generate potential solutions to the problem. If you run out of ideas, before the time is up, force yourself to generate ridiculous suggestions. One of them may start you on a novel and productive train of thought.
    c. Record all your ideas, no matter how ridiculous they may seem at the time.
2. Following the idea-generating period, review all your ideas and carefully analyze the one that seems most likely to yield a successful approach.
    a. Write down all the steps that would be involved in implementing the new approach.
    b. Carefully scrutinize and evaluate each step to see whether this approach would, indeed, allow you to overcome the current obstacle and also to anticipate any future obstacles that might crop up if you adopted this approach.
    c. If no major obstacles seem to be associated with this approach, go ahead and implement it. If you do foresee a major obstacle, then choose another seemingly reasonable idea from your list and repeat this critical analytic phase.

Criterion: When you find yourself spontaneously responding to work-related problems by entering a noncritical idea generating phase before narrowing your attention to the analysis of specific solutions, you will have accomplished this goal.

To Become Proficient in Developing New or Improved Work Methods

Good, creative ideas for replacing or revising current work methods and approaches are most likely to occur to the people who are using these current procedures. Thus you are an important source of ideas for improving the work procedures used in the types of projects you are working on.

1. Carry a small notebook around with you for jotting down ideas about possible improvements you might implement in the projects you are involved in.
    a. When something on the project is not going as you think it could, make a note of it. Keep it in the back of your mind as you go through your workday.
    b. Allot some time period, a lunch hour every couple of weeks or a quiet evening--to study your notes and to work out recommendations for improvements you can implement.
2. Meet with your manager (or project leader) to review your suggestions and to obtain input.

    Do not be discouraged if your recommendations are not adopted. Recognize that it is likely that many of your suggestions may not be feasible, economically or otherwise. But follow these common sense rules to maximize the value of this meeting for both you and your manager:

    a. Try not to be threatened or to defer too quickly when your manager disagrees with you. Instead, take advantage of the opportunity to learn what important elements enter into your manager's decision-making process, ask what the reasons are for their position.
    b. Make sure your own rationale is understood, just making the suggestion is not enough. Your recommendation can be more easily evaluated and is more likely to command the thoughtful consideration of others if you also describe the need the suggestion meets.
    c. If a recommendation is not seen to be feasible, determine whether your manager sees the motivation behind it as valid. If so, discuss other possibilities for meeting the need.
3. When you and your manager believe that one of your recommended improvements can be feasibly implemented, work out an implementation plan with a rough timetable.
    a. Build into your implementation plan periodic meetings with your manager to discuss your progress.
    b. After implementation is completed, meet again with your manager to evaluate the impact and effectiveness of the change and to discuss ideas for other projects.

Criterion: As you become more certain that your recommendations are valuable to your manager and are receiving serious attention, you will have moved beyond the point where this task is of major benefit.

To Generate Innovative Solutions to Work-Related Problems

By looking at organizational activities from an innovative perspective, it might be possible to generate new solutions to old problems.

1. Select one major problem that co-workers have repeatedly encountered over the past 6 months.
2. Record the nature of the difficulty, how and if it has been handled in the past, and the success with which the solution was met.
3. Meet with co-workers to generate as many potential alternative solutions as possible.
4. Do not limit yourself to one or two solutions, since this will curtail creative thinking and cause too much concentration on detail. For the moment, concentrate on innovation rather than on the limiting factors of implementation.
5. Review this list of potential solutions and see if it is possible to combine the best parts of several into one superior solution.
6. Seek additional input from your manager and discuss the feasibility of implementation.
7. Arrange for follow-up a month later with the individuals affected by the innovation to determine if it is serving its purpose.

Criterion: If the innovative solution is implemented and if feedback indicates that the previous difficulties have been eliminated or substantially reduced, this will be an indication to you that this activity has been worthwhile.

To Broaden the Applicability of Innovative Problem Solutions

Once an innovative solution to a problem has been implemented, this does not necessarily mean that it cannot still be improved upon or expanded. If the innovation has proved to be a success, it can perhaps be more broadly applied to other groups or units, thereby making their own operations more efficient.

1. Write down your ideas for how a recent innovation can be more broadly applied.
2. Note the benefits that would be derived from more broadly implementing the innovation.
3. Note limitations in applying the innovative solution on a broader scale. In doing so, take into account the unique needs and problems of groups or units that would be affected by the innovation.
4. Develop a plan for implementing the innovation, including a tentative timetable.
5. Discuss the feasibility of this plan with your manager. If they view your recommendations as being sound, discuss the fine points of how and when it can be most practically implemented.

Criterion: If the solution is implemented on a broader scale and if feedback from individuals affected by the change indicates that the proposed benefits of the change have, in fact, come about, this will indicate that you have been successful in broadening the applicability of innovative problem solutions.

To Generate Innovative Approaches to Work Procedures

Since procedures for accomplishing assignments have a habit of becoming ingrained, it is necessary to periodically look at them from a critical and skeptical viewpoint to determine if they are still serving their purpose.

1. Select a procedure with which you frequently have had difficulty in the past.
2. Each time you follow this procedure over the next month, be very critical of each step involved.
3. Pinpoint exactly what you feel is wrong with the operation as it now stands.
4. Based on your step-by-step analysis of the procedure, you may feel it would be desirable to do one or more of the following:
   a. Eliminate steps
   b. Add steps
   c. Combine steps
   d. Resequence steps

5. Discuss your ideas with individuals who would be affected by an innovation in this particular procedure. Urge them to give you their viewpoints concerning possible benefits of the proposed change and/or any difficulties they can foresee in its implementation. By so doing, it is likely that these individuals will have a better attitude toward the innovative solution if it is, in fact, implemented.

6. Develop a tentative corrective action plan based on your step-by-step analysis of the procedure and your discussions with others.

7. Present this plan to your manager. Be prepared to justify your rationale for the proposed change.

Criterion: If the innovative solution is implemented, feedback you receive from individuals affected by the change should indicate that the problems they encountered in using the old procedure have either been eliminated or minimized by following the innovative procedure.

To Utilize Innovation in Job Assignments

Your contribution to the organization and to the organization as a whole is increased when you seek out opportunities on the job to demonstrate your innovative strengths.

1. Find opportunities to utilize your creative skills. Within the next month, consider changes in job assignments that would give you time for creative thinking and planning.
   a. Seek opportunities to apply new approaches, both within your organization and elsewhere in the organization.
2. Become involved in projects involving other work groups where you will be exposed to different viewpoints and concerns.
3. Seek the opportunity to represent your manager in meetings where creative input is needed.

Criterion: When you have successfully engaged in one of the above suggestions, you will have accomplished the objective.

To Capitalize on Strengths in Innovation of Future Development

Seeking out opportunities on the job to capitalize on your innovative strengths can make you a more valuable contributor not only to your own work group but to the organization as a whole.

1. Write a position paper within the next 3 months on the future directions of your unit or organization. This paper should focus in on innovative products and services that you believe should be developed over the next 2- to 3-year period.
2. Establish a tentative timetable for implementation of these innovations within your unit or organization.
3. Meet with your manager to evaluate your paper. Be prepared to fully justify the rationale behind each of your proposed innovations. That is, what need is each of the innovative products and services designed to meet? Depending on how receptive your manager is to your proposed innovations, actual goals or objectives could be established based on your discussion with them.

Criterion: If your manager sees some of your recommendations as being sound and if steps are taken to implement them, this will be an indication to you that this exercise was worthwhile and that your efforts to capitalize on innovative strengths are channeled in the right direction.

To Apply Strengths in Innovation to Existing Products/Services

Capitalizing on your ability to see new approaches and applications to existing products/services can make your contribution even more valuable not only to your own work group but to the organization as a whole.

1. Volunteer to organize a brainstorming session with other employees within the next 2 months to discuss possibilities for innovative applications of existing products and/or services.
2. Generate as many potential applications as possible. Limiting yourselves to only one or two ideas will curtail creative thinking and cause too much concentration on detail. For the moment at least, concentrate on innovation rather than on the limiting factors of implementation.
3. Review the list of ideas you have generated as a group.
4. Narrow your list of ideas down to the two or three best, taking into account the practicality, cost effectiveness, and ease of implementation of each idea on your original list.

5. Attempt as a group to reach consensus on the one best idea.

6. Develop a tentative plan for how this idea can be implemented.

7. Present your plan to your managers and discuss the possibility of implementation.

Criterion: If one or more of these ideas are implemented and you receive positive feedback from others on the outcome, you will know that this exercise in creativity has been worthwhile and that your efforts to capitalize on your strengths in innovation are channeled in the right direction.

To Display More Persistence in Defending Ideas

Many of your good ideas may never see the light of day if you are too easily threatened by others' initial negative reactions to these ideas.

Follow these guidelines over the next 3 months when offering suggestions to your manager or other individuals.

1. Try not to be threatened or to give in too quickly if the individual disagrees with you.

2. Ask what the reasons are for their position.

3. Make sure your own rationale is understood--just making the suggestion is not enough. Describe the need your suggestion meets.

4. Be prepared to discuss your possibilities for meeting the need if the individual sees your recommendations as unfeasibile yet the motivation behind it as valid.

Criterion: Increased acceptance of your suggestions over the 3-month period will indicate that you have successfully mastered this activity.

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To Clarify Basic Job Requirements

There are a certain number of tasks in any job that the employee is expected to handle without being told.

1. List all the basic required tasks of your job.
2. Discuss with your manager any questions you may have about those duties and any concerns you may have about your abilities in those areas.
3. Make sure your manager agrees that you have included all required tasks.
4. Keep a copy of the list to be used in preparing for future performance evaluations.

Criterion: Once you have developed a basic list and it has been approved by your manager, you will have met this goal.

To Improve Receptivity to New Responsibilities and Job Assignments

A cooperative attitude will contribute to harmonious working relationships and improve performance. By accepting assignments in a positive manner, you will develop a reputation of being supportive and trustworthy.

1. If you find yourself being less than cooperative or receive feedback to this effect, determine the root causes of the problem.
    a. If interpersonal conflict plays a role, resolve to discuss the matter within the next week. If you feel that a mediator is necessary, ask a co-worker or your manager to sit in on this discussion.
2. Be honest with yourself and your manager. If new responsibilities and job assignments do not seem to fit your career objectives, discuss the issue with your manager.

Criterion: When you have identified and remedied the cause of the problem, you will have accomplished this suggestion.

To Demonstrate a More Professional Approach to Working Hours

A willingness to be flexible concerning work breaks, lunches, and quitting time is one indication of professional commitment to your job. However, it is possible for an individual to become so used to a certain time schedule that an interruption to this routine can cause a great deal of irritation.

1. To loosen the extent to which you live by the clock, spend a week avoiding all but the necessary contact with time mechanism.
    a. Place your wrist watch in your desk. Consciously avoid glances at any wall clock. Concentrate on your work.
    b. At the end of each day, consider how swiftly the day went by when measured by your internal sense of time.
2. The following week, try to consciously alter your routine regarding breaks, lunches, and quitting time.
    a. For instance, have a later lunch hour, spend less time than usual on breaks, or stay a little later on your job.
    b. If you consciously choose to alter your routine on your own initiative, perhaps it will not be as upsetting when the demands of your job require such interruptions.
3. When events arise that require unexpected changes in your work schedule, try to reduce your irritation by thinking about the causes of these events, the reasons they could not have readily been foreseen and their importance for the project you are working on.

Criterion: When you can respond to unforeseen events requiring schedule changes without complaining or feeling any particular resentment, you will have accomplished this goal.

To Minimize Procrastination

A required task does not become easier or more pleasant to tackle if it is procrastinated until the last minute. Furthermore, procrastinating a task until the last minute can lead to missed deadlines if emergency situations arise to claim your time.

1. Think back to some of the assignments that you have procrastinated on over the past several months.
2. Analyze them to find out what it is you expecially disliked about them.
3. Make a list of adjectives that describe your feelings about these tasks. This list might include, for example, words such as lengthy, tedious, or boring.

4. Once you have discovered what it is that makes these tasks so distasteful, try to think up ways to make them more palatable in the future.

    a. If you have described a certain task as lengthy, tedious, and boring, try to envision a way of tackling it that will eliminate some of the routine and add more interest to it.

    b. Where possible, divide the assignment into small daily portions that are more easily handled.

    c. If a certain assignment is particularly complex and mentally exhausting, set aside your most productive time period during the day to work on it.

5. Ask colleagues engaged in similar work what strategies they have adopted to avoid procrastination on particular assignments. Integrate suggestions.

6. Implement the above strategies in handling assignments over the next 1-month period.

Criterion: Once you are able to successfully meet deadlines without taking time away from other projects and without any last-minute rushes to complete assignments, you will have mastered this suggestion.

To Improve Effort by Eliminating Disruptive Factors

Everyone procastinates at times, although the reasons for doing so may be quite varied. Boredom, for instance, can be a forceful contributor to putting things off. Being uncertain of what is required often leads to procrastination. Job performance may also be hampered by a perfectionist attitude.

1. During the next week, make a list of activities you no longer find challenging. For each activity, write down at least three suggestions that would add new life to the task. Decide which changes would be the most practical, that is, achieve the most at the least cost. Implement the changes one at a time so that you have the opportunity to evaluate the results.

2. If you are unclear about elements of your position or a specific task, check with your manager for clarification. When a task seems unmanageable because of its complexity, break it down into its component parts so that you may tackle it one step at a time.

3. Strike a balance between adequate planning and waiting until the last minute. Keep goals and deadlines in mind so that you avoid the tendency to get bogged down in unnecessary detail.

Criterion: Accomplishing this suggestion should allow you to get 25 percent more done in the same amount of time, thereby increasing your effectiveness.

To Avoid Minor Frustrations Halting Your Work

Do not be discouraged when certain tasks do not work out exactly as you thought they would. This is a natural occurrence.

1. When you are blocked, take a short break from the activity and avoid thinking about it. Clearing your mind will help you reapproach the work with renewed energy. In an experiment with college students, researchers found that switching activities when students became bored or frustrated, actually improved their performance.

Criterion: When you are able to continue work despite minor frustrations or block, you will have accomplished the objective.

To Avoid Getting Blocked by Minor Frustrations

Some frustration is an inevitable part of any job, but it is important not to let frustration decrease motivation or cause unsatisfactory performance. Identifying and tackling sources of frustration is an important step toward remedying the problem.

1. For the next 2 weeks note all sources of frustration, no matter how small, and the consequences of each.

2. For each item on the list propose what could have been done to overcome the situation or what might have prevented it from occurring in the first place.

3. When you hit a roadblock in the course of normal functioning, stop what is being done and look at the situation from a new perspective. Sometimes just a few seconds will accomplish dramatic results; some occasions may benefit from switching to another task and returning to the problem later.

4. For two of the sources of frustration generate alternative plans for accomplishing the goal.

5. Do the same for two upcoming situations that are likely to be plagued with frustrating problems.

6. After 2 weeks, assess improvements in the ability to overcome frustrations.

Criterion: Completion of this suggestion requires alternative plans be developed for four functions that should result in a reduction in number and consequences of frustrating experiences at a second 2-week evaluation.

To Recognize the Difference Between a Highly Motivated Employee and One Less Well Motivated

If your manager sees you as not highly motivated, the problem may be due to your inability to understand what behaviors they see as indications of high motivation.

1. Spend 1 day working alongside an individual considered by your manager to be a highly-motivated worker. Ideally, this should be someone whose position title is the same as yours. Pay close attention to the way they go about doing the job, and at the end of the day prepare a list of the ways in which that individual's approach to the job differs from your own.

2. Review that list and decide upon features of the motivated worker's sytle that you can adopt or other specific changes you are willing to make in your own approach to your work.

3. Carry a notebook with you on the job for the next 2 weeks and make a note documenting every example of your new approach. At the end of the 2-week period, review your notes with your manager and ask them to indicate whether or not they see those behaviors as evidence of increased motivation.

Criterion: When you and your manager have agreed upon certain on-the-job behaviors or activities as evidence of high motivation, you will have successfully carried out this developmental activity.

To Increase Achievement Motivation and Professionalism

High achievement motivation often accompanies a professional approach to job performance. The job then becomes not only a paid service to the organization, but also a vehicle of advancement for the individual. This two-way interaction, involving both giving and taking, promotes the growth of both the individual and the organization. To increase your achievement motivation, you may need to clarify your ultimate career goals and objectives.

1. Over the next month, spend some concentrated time analyzing your work life. First, review all of your past jobs to identify the aspects you enjoyed and aspects you disliked.
    a. This should help you to start thinking about what your interests are. We all have vague ideas about what we like and dislike, but it helps to clarify these preferences in terms of specific job activities.

2. Try to make an objective assessment of your special skills and abilities.
    a. Start by thinking back over your experiences in high school and any post-secondary education you might have. Make a list of the areas in which you received consistently high grades. List feedback you have received from your teachers in terms of your unique capacity in a certain area. Review your extracurricular activities to see if any particular success you might have met would indicate that you are particularly skilled at a certain activity.
    b. Then, in a similar fashion, analyze your work history. Was there something you did or are particularly proud? If so, upon what skills did it draw?

3. Once you have made a written assessment of your interests and skills, try to establish some specific goals that would apply to them.

   a. Set up an interview with your manager to discuss your aspirations, to determine more explicitly what possibilities for promotion exist, and to discuss the impact that your performance in this job can have on your future promotability.

Criterion: When you can clearly see how your current job fits into the career path you want to pursue, and you have gained a sincere appreciation for the influence that your performance in this job could have on your attainment of your eventual career goals, then you will have accomplished these goals.

To Capitalize Upon Strong Motivation by Improving Procedures

While it is necessary to follow established procedures in your work, this does not mean that these procedures should not be viewed critically or that they cannot be improved upon. New developments and circumstances may make established procedures obsolete.

1. Actively seek ways to improve organizational procedures. Take the initiative rather than waiting for direction. When something on the job is not going as you think it should, make a note of it.
2. Think about ways the situation can be improved.
3. Meet with your manager to review your suggestions for improvement and to obtain their input. Make sure your own rationale is understood--just making the suggestion is not enough. Be prepared to describe the need your suggestion meets.
4. Work out an implementation plan and timetable if your manager believes that your recommendations can be feasibly implemented.
5. Seek feedback from individuals affected by the procedural change.

Criterion: If the new procedure meets with a favorable response from individuals using it in their work, you will know that your efforts have been worthwhile.

To Improve Effort by Reorganizing Priorities

Sometimes a lack of effort on the job is simply a result of not having enough energy because you are spread too thin.

1. During the next month, determine if you are trying to accomplish too much and need to shuffle responsibilities.
   a. If you are not getting sufficient rest because you have taken on more than you can handle, prioritize and cut back on the nonessentials so that you may increase the quality of your remaining tasks.

Criterion: When you have eliminated two tasks or activities that were low in your priority rating, you will have accomplished this suggestion, leaving more time and energy for important items.

To Accomplish Your Goals for the Day or Week

In order to make an accurate assessment of your performance, it is necessary to have goals against which to compare your actual progress.

1. Ask yourself "What do I want to get accomplished today (this week)?"
   a. Write these down, and at the end of the day or week, compare what actually got done with your predictions.
2. Revise your predictions for future days/weeks until you become more proficient at goal setting.

Criterion: Writing out a work plan ahead of time will help you better organize your time in order to meet your goals.

To Increase Extent to Which Deadlines Are Met Through the Use of a Log-In System

In order to meet deadlines, it is necessary to have a clear idea of the outstanding tasks assigned to you and their specified dates for completion.

1. Prepare a log-in system for recording assignments. This system should record at least the following information.
   a. The date the assignment was received
   b. Who assigned it
   c. Established time commitments and deadlines
   d. Date that the assignment was completed

2. Once the system is operational, review the log at the beginning of each day to determine the order in which work should be processed.

Criterion: This procedure is to be followed until the above log indicates that 80 percent of all deadlines were met within a 2-week period.

To Meet Deadlines

Failure to meet deadlines is unhealthy not only for the organization but for the organization as a whole. When a delay occurs or unforeseen problems arise, prompt corrective action should be taken so that the original deadline is met if at all possible. One means by which to do this is to develop alternative solutions to problems or alternative methods of accomplishing the same objective in the event that your original plans are blocked.

1. Identify two or three alternative methods of accomplishing goals in each project you are assigned over the next 3 months. Even after the best method of goal accomplishment has been decided upon, maintain a written record of those methods that were rejected.
2. Refer to the alternatives that were developed if a delay or unforeseen problem arises. Through discussion with your manager and others involved, determine which alternative is most likely to lead to goal accomplishment on a timely basis.

Criterion: At the end of the 3-month period, review to what extent generating alternative methods has helped you and others to meet your deadlines. If unforeseen problems have occured, yet you have still been able to meet original deadlines by applying alternative methods of goal accomplishment, you will know that you are successfully mastering this suggestion.

To Improve Ability to Meet Deadlines

Backward planning is a useful technique to ensure that deadlines are met.

1. Over the next 3 months, each time you begin work on a task that will require extended work, use backward planning.
    a. Starting with a target date for completion, work backwards and make estimates of what needs to be done each week prior to the target date in order to meet the deadline.
2. Transfer these work objectives to the appropriate dates on a calendar specifically assigned for this function.
3. Review the calendar at the beginning of each work week to review your planned work targets.

Criterion: When you can comfortably meet your deadlines on complex tasks, you will have mastered this exercise.

To Increase Work Pace

The pace at which you perform your activities will be influenced by the amount of experience you have had on the job. However, there are many things you can do to increase your work pace now, rather than to simply wait until time has made you a pro. One of these is to make a conscious effort to examine how you go about your tasks. With this increased awareness, you can then evaluate your approach in terms of its efficiency. Try to become your own efficiency expert.

1. Select several of your tasks that are especially time consuming. Over the next month try to find time to analyze your approach to each of these.
    a. Before you begin the first task, obtain a notebook.
    b. Record each step you take in performing the task. It is important this step-by-step description is done in great detail.
    c. Critique your procedure. Did you backtrack during the operation? Did you go through a step that later turned out to be irrelevant and simply time consuming? Did you have to turn to the same source for information on several different occasions? Are you spending time repeatedly copying data that could easily be instituted into a form for reuse? (Try to critique each step you have taken in terms of the amount of time spent unnecessarily.)
    d. On the basis of these considerations, revise your prodecure for performing the task. Write down the new procedure to refer to the next time you need to perform that task. Do this with each of the time-consuming tasks you initially identified.

2. Follow your written outlines of new procedures for performing these tasks until you feel completely comfortable with the new approaches and can adhere to them without consulting your outline.
    a. Subject your new procedures to the same analysis and critique that you used with original procedures.

Criterion: You will have been successful at this task if your new procedures prove to contain significantly fewer time-wasting steps than did your original procedures.

To Better Notice Problem Situations

Often problems are ignored because everyone is too caught up in day-to-day activities to notice or care.

1. Take a moment to step back and view your organization from the perspective of an outside observer.
    a. What changes would you make in operating procedures?
    b. Are resources being utilized to their maximum capacity?
    c. Are there problems whose solutions have been stalled because routine operations prevent anyone from attending to them?
2. Make a list of suggestions and recommendations and discuss it with your co-workers.
3. Within the next month, prepare a detailed plan for changing one operation or solving one problem and present it to your manager for comments.
    a. Ask permission to implement the change on a trial basis and set up evaluation dates to judge success.

Criterion: When you have identified two or more problems and implemented changes to alleviate one of them, you will have accomplished this suggestion. You will be more vigilant in avoiding future crisis.

To Develop Your Ability to Work Under Minimal Supervision

Your ability to work effectively with minimal supervision is an important index of your commitment to group goals and your professionalism.

1. List the areas of your work in which you believe you are receiving closer supervision than is necessary.
    a. Meet with your manager. Ask whether they would be willing to supervise you less closely in these areas if you demonstrate that you can continue to work effectively under these new conditions.
    b. If your manager is willing to try, work out a plan together (including at least clearly defined work standards and follow-up checkpoints) whereby you will receive less close supervision but will monitor yourself closely enough to be able to provide periodic evidence, to your manager, of your continued effectiveness. Develop specific criteria for evaluating your performance under these more relaxed conditions. Set a final follow-up date where you will both review the successfulness of this attempt and decide how to continue.
2. Once you implement a plan that allows you to work under less close supervision, be sure to keep your manager or project leader well informed of your work progress.
    a. Promptly notify your manager of any difficulties you are experiencing in your work and work out an acceptable solution.
    b. Initiate a regular series of brief follow-up meetings or memos, if this was not part of your original plan, so that your manager does not have a chance to worry and get unnecessarily concerned.
    c. Periodically evaluate your performance against the prespecified criteria and take immediate action to correct any deficiencies.

3. At the final follow-up meeting, systematically evaluate your overall performance, while working under these more relaxed supervisory conditions. Use the prespecified criteria.
    - a. If you have not done as well as expected, try to develop a new plan under which you would receive a degree of supervision that falls midway between the close supervision you received initially and the relaxed supervision you received under the first plan.
    - b. If you have met or exceeded the criteria, try to develop a plan through which the amount of supervision you receive is reduced even further.
    - c. If you do implement a new plan, keep the earlier cautions in mind.
4. Continue seeking ways of reducing the amount of close supervision you receive and improving your ability to work under minimal supervision, until such time as both you and your manager or project leader believe that no further change in this respect is worthwhile.

Criterion: When you are satisfied with the amount of supervision you are receiving in all areas of your work, and believe it is appropriate to your current levels of expertise in the various areas, then you will have accomplished this goal.

DEVELOPMENT ACTIVITIES

D. ATTENDANCE AND PUNCTUALITY

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To Reduce Problems Caused by Foreseeable Absences 25

To Maintain Physical Health 25

To Cope With Personal Problems 25

To Increase Presence at the Work Station 25

To Avoid Abusing Breaks 26

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To Ensure Prompt Arrival at Work

Respect for company time is evidenced by your arrival on time each morning ready to work the full number of hours for which you are paid.

1. Think of at least two specific ideas to ensure work is begun at the appropriate time each day. The suggestions listed will, of course, depend on what you feel is the cause of any evidenced tardiness. Suggestions could include:

   a. Waking up 15 minutes earlier.

   b. Arriving at work 15 minutes earlier so that time spent socializing with co-workers does not run over into working hours.

   c. Doing one to two morning activities the night before.

   d. Joining a car pool.

2. Over the next 6 weeks, put these selected ideas into practice daily.

Criterion: If you have been successful, you will arrive on time for work each day.

To Reduce Problems Caused by Foreseeable Absences

In the event that you will be absent from work for a complete day or for shorter periods during the day, it will minimize disruption of others' schedules if advance notice is given and arrangements to complete tasks are made prior to the departure.

1. For the next month, record all times when you will be unavailable to complete work for reasons that should have been evident in advance. The purpose of this is not to check up on you but to promote smooth functioning in the organization.

2. For the next month, maintain adequate work schedules despite absences. When you can anticipate being unavailable, it is your personal responsibility to inform others in advance.

Criterion: Completion of this suggestion should result in subsequent weeks being relatively free from problems caused by foreseen absences.

To Maintain Physical Health

Your physical health will not only affect your attendance record at work, it will also be a factor in the way you use company time while you are there.

1. Obtain and read some material on the basics of good health. Investigate a health maintenance for information on good health.

2. Critique your present lifestyle based on this material.

3. Develop two or three ideas that would help ensure health maintenance. Suggestions could focus on:

   a. A change in diet

   b. An exercise program built into a weekly schedule

   c. The proper amount of rest

4. Implement these suggestions over the next 6 months.

Criterion: The results of giving proper attention to health should be evident in increased enthusiasm and energy displayed in all of the various life activities.

To Cope With Personal Problems

Personal problems can affect work attendance.

1. A physician or member of the clergy can serve as a confidential referral service for employees with either work-related or personal problems.

To Increase Presence at the Work Station

Consistent presence at the work station ensures that you are available should any immediate assistance and/or information be required. It is also a highly visible signal that you are attending to the work for which you are responsible.

1. Clock the amount of time spent away from the work station. During the initial week, follow the usual routine.

2. After 1 week, calculate the average amount of time per day spent away from the work station.

2

3. In the following week, repeat this procedure. However, at this point, work on decreasing the average for the week.

Criterion: Repeat this procedure until the calculated weekly average has decreased by a percentage mutually agreed upon by you and your manager or 25 percent.

To Avoid Abusing Breaks

The abuse of lunch and coffee breaks can have many harmful effects on the department, not the least of which is decreased work time. Conscientious use of break time contributes to efficient operation and a productive atmosphere.

1. Your manager will be consistent about enforcement of break time. More than anything else this will prevent you from taking advantage of ambiguity.
2. Your manager will let you know what is expected and give feedback immediately in cases of violation.
3. Your manager will speak with a repeated offender to determine what is the cause of the problem.

Criterion: Two weeks free from abuse of coffee or lunch breaks indicate completion of this suggestion.

To Minimize Distraction of Fellow Employees

Idle talk can interfere with the work of others although some degree of interaction is a necessary part of the work atmosphere.

1. Courtesy is important when you speak with others. Check first whether speaking is viewed as a distraction and whether the conversation could better be postponed until later.
2. Act as a model by tactfully informing others when you are distracted by conversation.

Criterion: Following this suggestion should minimize the number of distractions during the work day.

DEVELOPMENT ACTIVITIES

E. ORGANIZATIONAL AND JOB COMMITMENT

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To Increase Flexibility Regarding Work Schedule

A willingness to be flexible concerning work breaks, lunches, and work hours, when necessary to complete a work assignment, is a good indication of commitment to a job.

1. Over the next month, fill in a chart each time an urgent job is assigned. This chart will have such headings as: "Rush" Item, Requested By, Time Requested By, Time Requested for Completion, and Time Actually Completed.

2. Before leaving for work breaks, review this chart to determine whether postponing the break would allow the task to be completed by the requested time. If so, you should do so.

Criterion: If your flexibility regarding the work schedule has increased, your chart should indicate a similar increase in the number of tasks completed on time.

To Improve Adaptability by Changing Work Routine

A willingness to be flexible concerning work breaks, lunches, and quitting time is one indication of strong commitment to a job. However, it is possible to become so used to a certain time schedule that an interruption to this routine can cause a great deal of irritation. The following exercises vary routine and can help you "get out of a rut" and therefore, increase receptiveness to change.

1. To reduce the extent to which you live by the clock, spend a week consciously avoiding clock watching.

   a. Put your wrist watch away and avoid glances at any wall clock.

   b. At the end of each day, consider how swiftly the day went by when measured by your internal sense of time.

2. The following week consciously alter the routine regarding breaks and lunches.

   a. For instance, take a later lunch hour and/or take your breaks at different times.

   b. If the routine is consciously altered on your initiative, perhaps it will not be as upsetting when the demands of the job require such interruptions.

3. When events arise that require unexpected changes in the work schedule, try to reduce your irritation by thinking about the causes of these events, the reasons they could not have been readily foreseen, and the importance of completing them on time.

Criterion: When you can respond to unforeseen events requiring schedule changes without complaining or feeling any particular resentment, this goal will have been accomplished.

To Increase Adaptability in the Use of Slack Time

Often a slack period or an equipment failure will disrupt the work of a whole organization. It may be tempting to wait for someone else to direct you to other activities. With a little advance planning, however, you can learn to use such periods constructively.

1. Develop a list of activities that do not need to be accomplished immediately, but would facilitate job performance in the long run. Each time you come across a task that would improve effective performance, but cannot be accomplished during the normal workday, add the task to this list.

2. When work is slack, refer to this list to serve as a program of activities.

Criterion: This exercise will be completed when you and your manager agree that you are utilizing slack time more constructively.

To Increase Acceptance of Difficult Work Assignments

The ready acceptance of difficult work assignments is a strong indication of commitment to a job.

1. List all assignments that have been put off or avoided over the past 2 or 3 months.

   a. Analyze each task to find out what was specifically disliked about it.

   b. Once it is determined what makes these projects so distasteful, try to think up suggestions to make them more palatable.

1) If a certain job is boring, try altering the approach to the task so that some of the routine is eliminated and more interest is added to the operation.

2) If the task appears utterly devoid of interest, try dividing it up into daily portions that are more easily digestible.

3) If a certain project is regarded as complex and unwieldly, try breaking it into small assignments that are easily handled and less initimidating.

c. Come up with at least one suggestion for handling each of the listed tasks.

2. Over the next month, make a concerted effort to accept such assigments in a cooperative manner.

   a. To avoid procrastination, set up a timetable for assignment completion.

   b. Review and implement the suggested strategies developed for handling the job.

Criterion: If 80 percent of the jobs defined as difficult have been accepted in a cooperative manner and completed on time during this period, you will have mastered this exercise.

To Increase Awareness of Job Relevance

One important element in any individual's commitment to a job is a sense that work performed is important. If you build up an appreciation for the worth of your job, you are more likely to find yourself taking a much more energetic approach to your work.

1. List all of the various duties performed.
2. Categorize the duties roughly into high, medium, and low importance.
3. Write out one potential consequence of poor performance and one possible consequence of above average performance for each duty listed.
4. Present this list to your manager within 1 week and use it as a jumping off point for a discussion of how your work contributes to the overall functioning of the organization.

Criterion: When you consider work on a task important and strive to do the best work possible, this goal will have been accomplished.

To Increase Job Scope

Sometimes what is viewed as poor commitment to a job is really a matter of an insufficient work load.

1. Meet with your manager to work out a plan to increase your responsibilities. Plans could include taking on more assignments of the type presently handled or expanding the job to include new responsibilities.
2. A feedback session is to be held after you have worked under these changed conditions for 3 weeks. Any problems that might have arisen in assuming these new responsibilities should be handled at this time.

Criterion: Once you have taken responsibility for at least two additional tasks, the requirements of this exercise will have been met.

To Capitalize on Strong Job Commitment

By being strongly committed to your job you can use your drive and initiative to further the progress of your career.

1. List all the basic skills required for the job.
   a. Review the listed skills to determine where strengths and weaknesses lie.
   b. Develop at least one suggestion for improving a defined weak area. For instance, inquire about brush-up courses available in area community colleges.
2. List skills that are not required but would make you more useful to the organization.
   a. This list could include not only specific technical skills, but also more general skills, such as the ability to get along with others, to be innovative, to think more analytically, and to communicate effectively.

   b. Develop at least one suggestion to acquire a selected skill. This could include signing up for a technical course; thinking about enrolling in some courses in psychology; or participating in a sensitivity group recommended by an area college.

Criterion: When you have developed and carried through at least two suggestions, one for improving a required skill and one for acquiring a new skill, the requirements of this exercise will have been met.

To Ensure a Thorough Understanding of the Organization's Goals and Policies

1. Over the next 2-month period, review each of the major goals and policies of the organization.
   a. Review at least one policy or goal statement every 2 days.
   b. Try to specifically relate the directive to work in your organization.
   c. Prepare a brief summary of the major points included in the goal or policy statement and how the directive affects your organization's operation.
   d. Insert the prepared summary into a personal manual for future reference.
2. Meet with your manager at the end of this period to discuss any questions you may have regarding established directives.
   a. Ask your manager to update you on any recent policy changes.
   b. Make any necessary revisions to your personal manual.
3. Review your manual at least once every month over the next 6-month period.

Criterion: If you have been successful, you should notice that you are capable of answering all queries made, either by employees or individuals outside the organization, regarding the established policies and goals of the organization.

To Identify With Organizational Goals and Values

You should understand organizational goals and values and strive to identify with them. By so doing, your contributions to the organization will be a personal success rather than a personal sacrifice.

Over the next 3 months:

1. Make a list of personal goals and values that are of most importance to you. Based on your knowledge of the organization, also create a list of goals and values.
2. Compare these two lists to determine what similarities and discrepancies exist between the two. If you find that some conflicts do exist between your own and the organization's goals and values, seek feedback from your manager on how these conflicts could best be resolved, or at least minimized.
4. In those areas where there is a high degree of overlap between your own and organizational goals and values, seek feedback from your manager on how this might best be capitalized upon. For example, they may be able to suggest ways of changing or expanding upon some of your responsibilities to allow you to capitalize on this and to exercise your commitment to the organization.

Criterion: Assuming at least one new or expanded responsibility during the 3-month period will indicate completion of this activity.

To Use Discretion in Criticizing Organizational Policies and Procedures

Use discretion in criticizing organizational policies and procedures. Hashing over the criticisms with employees or others who are in no position to do anything about it is not only futile but can lead to low morale among employees.

If you are in disagreement with an organization policy or procedure:

1. Take steps over the next month to carry your criticism to individuals who are in a position of power to change it.
2. Be prepared to state the reasons behind your disagreement with the policy or procedure. State the exact changes you would like to see implemented and why.

3. Keep your feelings to yourself if the topic comes up in conversation between yourself and employees.

Criterion: One instance of carrying a criticism to higher levels over the next 1-month period will indicate completion of this activity.

To Increase Job Satisfaction

Adequate motivation is difficult without a degree of satisfaction in the job. To the extent that satisfaction can be increased, motivation will rise correspondingly.

1. Write a description of ideal conditions within your job classifications. This description should include actual tasks undertaken, relationships with others, responsibilities, etc.
2. Repeat the process for the actual conditions of the job, again being as specific as possible. Aspects that are particular problems should be noted as such.
3. Next compare the two descriptions and areas of potential change identified.
4. Meet with your manager to discuss practical ways of implementing changes that would increase satisfaction. Institute these on a trial basis and conduct evaluations at appropriate time intervals.

Criterion: The identification and restructuring of two aspects of the present work situation will complete this suggestion. A sense of greater participation in your job should result in improved performance.

DEVELOPMENT ACTIVITIES

F. QUALITY OF WORK

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To Establish Work Standards

In order to improve the quality of work, it is important to establish a clear set of standards against which performance can be evaluated.

1. Over the next month, tasks will be identified by your manager for which specifications can be written or clear standards described. Your manager will meet with you to discuss these specifications and ensure that they are understood.
2. For each of the tasks described, your manager will prepare a checklist of specifications. When you are engaged in a task, mark the appropriate places on the checklist. Upon task completion, the checklist should be turned in to your manager.
3. You manager will keep a record of errors, omissions, and necessary corrections made on each task over the next month. Whenever possible, your manager will provide immediate feedback.
4. At the end of each week, your manager will discuss your performance for the week and review the quality of work.

Criterion: Over the next month, the number of errors should be cut in half if this suggestion is completed.

To Improve Ability to Follow Instructions

The extent to which you understand and follow instructions will have an influence on the quality of your work. Failure in this regard can cost time, money, and cause unnecessary complications.

1. Over the next 2 weeks, summarize all instructions in the form of written notes. Review and update these notes daily. For instance, determine if the instructions provide the direction necessary to complete the task. If not, remedy the problem by seeking out further instructions.
2. Keep track of any work returned because instructions were not followed.

Criterion: Within a month, the number of times work is returned because of inadequacies will be cut 25 percent.

To Capitalize on the Ability to Follow Instructions

Employees who are very attentive to the instructions they receive will most likely function quite well in the completion of their tasks. However, focusing on following instructions to the letter might very well rule out the introduction of innovative and quality touches to the assignment. Once you have proven yourself quite capable of understanding and following instructions, test out your ability to go one step further.

1. Over the next 6 weeks, whenever you receive an assignment, review the instructions to see if you can incorporate some of your own ideas into how it should be handled. Try to think of at least one or two suggestions that you feel would add to the final quality of the work output. These ideas should never counteract explicit instructions; however, they can serve to compliment and upgrade stated requirements.
2. Prepare a notebook to record all steps you have implemented to improve the quality of assigned work.
3. At the end of this period, meet with your manager to review the notebook. Feedback as to how effective the ideas were and why should be given at this time.

Criterion: The notebook should indicate to you the extent to which you have met the requirements of this exercise. By the end of this period, you should have generated at least 15 suggestions as to how the quality of your work output can be upgraded.

To Achieve a Balance Between Independence and Interdependence

Ideally you should work more or less independently, but there will always be occasions when assistance is required. Independence will actually be facilitated by setting up channels for help if it is needed. This will lessen the probability of poor quality work due to unwillingness to seek help.

1. In the next month, discuss with your manager possible problems that might arise in the course of your work.

2. Persons or procedures to be used if problems do occur will be identified by your manager.

3. Ask for help if you need it. Independent thinking in those areas where greater flexibility is possible is encouraged.

4. If your manager perceives you are being overly dependent, you will be encouraged to define areas where independent functioning would be more appropriate. By progressing in some increments, the movement toward more independent functioning can be accomplished without undue threat.

Criterion: Depending upon your specific needs in this area, the use of two help channels or the performance of two tasks performed in a more autonomous manner will indicate completion of this suggestion.

To Ensure That Established Procedures Are Being Followed

When a problem in the quality of work does appear, it may be due to your having incomplete or sketchy knowledge of parts of the standard procedure. In such instances it is important to have detailed documentation of the correct procedure.

1. An employee who is particularly adept at a specific task will complete a detailed list of the steps ordinarily taken when handling the task. When you are identified as having a weakness in this specific area, the checklist can be used as a standard to determine where you may be working inefficiently or ineffectively.

2. Take notes on those areas where you do not conform to standard procedure. If you have difficulty pinpointing problem areas, your manager will provide assistance. You can then refer to these notes while working with the process until it becomes an automatic part of the procedure.

Criterion: When the revised procedure becomes a part of your ordinary procedure and you can perform the process correctly without referring to the notes, the requirements of this exercise will have been completed.

To Improve the Ability to Complete Work When Standard Procedures Are Not Applicable

It is important to be able to complete work when standard procedures cannot be followed because of a mechanical failure or other interruption. Knowledge of a variety of alternate procedures will help you to efficiently reroute work.

1. For a month, keep a record of the instances in which work was delayed because of interruptions to normal work procedure. Also, record the manner in which the interruption was resolved and the work finally completed.

2. Begin to document solutions for the various problems encountered. Organize the problems into related areas and list the solutions that were successful in dealing with the problem in the past. Expand on these solutions by consulting with lead personnel about alternative work procedures. When similar problems occur in the future, you will have a source of alternative procedures that can be referred to.

Criterion: Completion of this exercise should reduce by a percentage jointly agreed upon by you and your manager the times in which you are not able to complete work because of mechanical failure or other interruptions.

To Capitalize on a Thorough Knowledge of Format Specifications

A thorough knowledge of established specifications regarding the proper format for your work can be utilized to adopt a more innovative and critical approach to the manner in which work is presented.

1. Review the layout of all forms used to record data. Questions to be considered include:

   a. Are the forms easy to follow and understand?

   b. Are they easy to fill out?

   c. Do the most important data stand out?

   d. Have there been recent changes in the information that must be entered that would suggest a revision of the layout?

2. Extend this review to other types of work prepared. Specifications for format that already cover a particular job are to be initially reviewed. Try to come up with additional ideas to aid in the proper display of the material. For example, try to think of style specifications that would help to make the most important information stand out. The use of different colored pens might be employed with bright colors used for primary information. Underlining, capitalization, and the use of spacing are common techniques employed to highlight certain facts. In certain types of records, an accompanying chart or table might be usefully instituted to give an overall picture of the entered data.

3. Present this review to your manager within 3 weeks of assignment for appraisal to determine if the procedure can be introduced as a standard part of work procedure.

Criterion: Developing one suggestion to be reviewed by your manager completes this suggestion.

To Increase Extent to Which Work Output Meets Specifications

It is important that you are familiar with and meet organizational specifications regarding the proper format for your work. Specifications assist in the speed with which information can be processed. They are directed toward ensuring that the work is processed efficiently, the format is understandable to the user, and deadlines are met.

1. Prepare a personalized manual outlining the format and operational guidelines covering each work activity. Over the next 2 weeks, each time a new task is begun do the following.
   a. Review any organizational guidelines covering format and/or process specifications. (If the job is not covered in the organizational guides, review any established external guidelines that might cover the job for you.)
   b. Summarize the important points relating to format or operation for the job.
   c. Incorporate this summary into the manual.
2. At the end of this period, the completed manual should be reviewed. All suggested revisions are to be made by you.
3. Over the next month, each time you begin work on a new task, the prepared manual should be referred to, and format/operational guidelines covering the job should be briefly summarized.

Criterion: Completing this suggestion should reduce the negative feedback about the format in which you present work to a level acceptable to both you and your manager.

To Improve the Accuracy of Your Work

If the products of your labor are inaccurate or are not of sufficient detail, you may be attempting to accomplish too much and as a result are spreading yourself too thin.

1. Eliminate activities of lower priority that consume your time.
2. Check your work for changes that would improve accuracy.

Criterion: A month in which your work is received and judged to be accurate and of sufficient detail will indicate that you have accomplished this task.

To Increase Accuracy of Work

If your completed work contains more than a minimum number of errors, the value of the work is cut dramatically. Additional time and effort must be expended to bring the work up to established standards.

Over the next 2 weeks:

1. Keep a list of all jobs in which errors are noted. Record the types of errors made and the number of each.
2. At the end of this period, review this list to determine the 10 most frequent types of errors made on the job.
   a. Think of at least one suggestion for eliminating each of these types.
   b. Implement the suggestions over the following month.
3. Continue to maintain a list of errors made during this period.

Criterion: If you have increased the accuracy of work, the number of errors noted in the final 2-week period will have decreased by a percentage to be agreed upon by you and your manager.

To Improve Support of Quality of Work

One of the easiest and best ways to continue quality job performance is to recognize it. Money is only one of the motivators of good work; others are pride and a sense of accomplishment as well as self-esteem.

1. Be liberal with praise and judicious with criticism. Let others know when they have done a job particularly well.

2. When errors or mistakes do occur, offer feedback promptly and in a manner that will minimize the probability of a defensive reaction. The difference between saying someone has done something wrong and suggesting a way for improvement may seem like a little thing, but it can have dramatic results. Approach these situations with an attitude of cooperating toward improved functioning, rather than creating an adversary relationship.

Criterion: Completing this suggestion should result in a significant improvement in the quality of work done by others for you.

To Further Improve Good Quality Work

Even if your work is of consistent high quality, further experiences are helpful to develop in this area.

1. Offer input into improved techniques or methods for handling a specific job.

2. Help in the training of new co-workers.

3. If you are particularly adept at a certain skill that would be useful for others to have, offer a demonstration of that skill.

4. Accept new tasks that are more challenging or demanding than the normal work assigned to you.

Criterion Carrying out one of the above suggestions will indicate completion of this suggestion.

To Improve Neatness and Clarity

Work and reporting must be clear and neat to guarantee usefulness.

1. Ensure that handwriting is legible on written documents. If necessary, rewrite a document that your manager feels is unclear.

2. Information should be well organized and complete. For the next month, review any documents or reports and note suggestions and additions.

3. Whenever possible, your manager will provide you with an example of high-quality work to function as a standard.

Criterion: A month free of feedback that your work lacked clarity will indicate that this suggestion has been mastered.

To Improve Use of Materials

Economy of materials should be an important consideration in the performance of your job duties. Cost effectiveness is best maintained when materials and supplies are used conscientiously.

1. During the next month, keep a list of materials consumed for a given task.

2. Repeat this for four tasks, particularly those which are repeated during the work week.

3. Review with your manager changes that could be made in procedures and institute these on a trial basis. Offer suggestions on how the task could have been accomplished with fewer materials.

4. After 2 weeks, review progress and determine if further changes are necessary.

Criterion: Depending upon the task, a significant reduction in material expenditures on two of these tasks will indicate completion of this suggestion.

To Improve Quality Through Better Communication

Too often problems occur that could have been avoided through more open communication.

1. Sometime during the next week bring to your manager's attention problems that hamper job performance. Examples of this might be faulty or poorly operating equipment, lack of supplies, or uncertainty about what is expected.

   Extend this to interpersonal problems that might arise in the course of work.

Criterion: When you have brought a problem to the attention of a manager that would have previously gone uncorrected, or otherwise took the initiative to improve quality through communication, this suggestion will have been accomplished.

To Ensure High Ethical Standards Are Maintained

The strongly committed employee maintains high ethical standards in their general occupational orientation.

1. Prepare a general set of ethical standards that you believe should govern your general occupational orientation.
   - a. You may wish to have a preliminary discussion with your manager regarding values/ethics in the work environment before beginning this task.
2. For each established standard, state two concrete examples from your past work history to help illustrate the basic concept.
3. Over the next 4-month period, evaluate your actions on the job in terms of these established standards at least once every 2 weeks.

Criterion: If you find that the standards that you have established are actually evidenced in ethical work actions, you will have been successful.

To Improve Work Quality Through Skill Development

Sometimes poor performance is a result of poor or inadequate training.

1. In the next 2 weeks, conduct an assessment of the skills necessary to perform your job. This is for your development, be critical, but fair.
2. When you and your manager have cooperatively identified areas that could be strengthened, design and develop a plan to ensure that any needed training is provided.
   - a. You may elect to have the manager train you. If so, set up a schedule of training and evaluation criteria so that training goals can be monitored.
   - b. If you are working with a senior employee, perhaps that individual is the most appropriate person to conduct training.
   - c. With the help of your manager identify readings or other outside sources that would help you improve the quality of your work. Seek input from others experienced in this task.
   - d. Sometimes the most effective training is the most informal. Consider simply teaming up with an employee who is strong in a particular skill area in which you are less skillful.
3. Follow through any training program with a post assessment to determine whether the training program has achieved desired results.

Criterion: When two skills or procedures that had been judged inadequate are now found to be satisfactory, this suggestion will be completed.

DEVELOPMENT ACTIVITIES

G. ORGANIZATIONAL EFFECTIVENESS/INTERFACE

To Develop an Integrated Conception of the Organization and its Goals by Identifying Objectives, Functions, and Resources 37

To Identify Appropriate Contact People Within the Organization by Understanding the Organizational Structure 37

To Become More Familiar With Organizational Regulations and to Keep Abreast of Policy Changes by Being Informed of Relevant Procedures and Policies 37

To Be More Aware of Organizational Trends and Direction by Understanding Current Activity in Your Field of Endeavor 37

To Keep Aware of Changes in Organizational Policies and Procedures 38

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To Anticipate and Prepare for Upcoming Changes by Using Formal and Informal Communication Networks 39

To Develop More Forceful Personal Impact on Others by Appropriately Asserting Your Ideas 39

To Capitalize on a Thorough Understanding of the Interrelationships Among Organizational Units and Groupings 39

To Develop an Integrated Conception of the Organization and Its Goals by Identifying Objectives, Functions, and Resources

Achieving organizational goals requires the efforts of several coordinating units. It is essential for you to be aware that your unit's goals do not compete or conflict with those of other units, but are part of an interorganizational system.

1. After you have been assigned a project, make a chart listing the following items.
   a. The functions for which your unit will be responsible.
   b. The goals and objectives of your unit in relationship to the completed project.
   c. The resources and support that will be needed from coordinating units for you to successfully achieve your goals.
   d. The goals and objectives of the other units involved in the project.
   e. The ultimate organizational goal.
2. Discuss your chart with your manager.

Criterion: Completion of this activity should result in a greater awareness of interunit subgoals in relation to the ultimate organizational goal.

To Identify Appropriate Contact People Within the Organization by Understanding the Organizational Structure

When your project requires the assistance of others, knowing who to go to for support and cooperation is essential. If you are having difficulty identifying personnel to develop as contacts you might benefit from your manager's or a senior colleague's experience.

The next time you are assigned a project or task:

1. Ask your manager for organizational charts for the units with which you typically coordinate.
2. Determine which individuals you might contact and why.
3. Review this list with your manager or a senior colleague to determine how accurate you have been in selecting appropriate contacts in terms of this project.
4. Discuss any selection errors you made with your manager or colleague and why they were wrong.

Criterion: Completion of this activity should result in your being able to prepare a list of contact individuals that does not have to be modified by your manager or senior colleague.

To Become More Familiar With Organizational Regulations and to Keep Abreast of Policy Changes by Being Informed of Relevant Procedures and Policies

You are responsible for operating within the framework of the organization. To make appropriate decisions and develop effective action plans, you must be thoroughly familiar with all organizational procedures and regulations.

1. Obtain procedure manuals from your manager, and familiarize yourself with relevant established policies and procedures.
2. Check to see if you are on all route lists that explain policy and procedure changes.
3. Keep a file or update your manuals as you receive these changes.
4. Refer to the manual before you make any decision that may be affected by organizational policy.

Criterion: Completion of this activity should result in more readily available up-to-date references, and in your more consistently operating in accordance with established policy.

To Be More Aware of Organizational Trends and Direction by Understanding Current Activity In Your Specialized Field of Endeavor

It is characteristic of most fields of endeavor to change emphasis and overall strategy as competitive changes or progress dictates. You will be better able to deal with present day problems if you are aware of the long-range direction of your organization.

1. Investigate with your manager or a senior colleague the possibility of their inviting you to a long-range planning meeting as an observer.
2. Study organization literature regarding policy statements and goals for the future.

3. On an informal basis, discuss organizational direction with a respected high-level person.

4. Read a variety of professional and trade newspapers and magazines to determine overall trends.

Criterion: Completion of this activity should result in your developing a greater awareness of current trends in your specialized field.

To Keep Aware of Changes in Organizational Policies and Procedures

Adequate job performance requires that you are aware of current policies and procedures and how they affect your work.

1. Ensure that relevant information is made available to you. If it comes to your attention that material is passing you by, find out why and take steps to correct the situation.

2. Take notes on new policies and procedures. File these so that they are available for future reference.

3. Periodically discuss with your manager your understanding of organizational policies in matters of concern to you. Correct any misperceptions by acquiring and reading the pertinent information.

4. Make note of areas in which you are unfamiliar with policy or procedure. Take the appropriate steps to remedy the situation, enlisting the help of others in finding the resources if needed.

Criterion: When 2 months without problems or misunderstandings caused by your unfamiliarity with organizational policy have passed, you will have mastered this suggestion.

To Become More Politically Astute Through an Awareness of Decision-Making Authority and Responsibility

When work activities require the input and cooperation of a number of people and resources, it is important and expedient to know who has the decision-making authority and responsibility for the various phases of your project.

1. Obtain an organizational chart and a list of job responsibilities for your organization and for coordinating organizations from your manager.

2. Over the next several months when you are assigned a project or task, consult these references, then make a list of whom you will keep abreast of progress (informally and formally), and whom you will approach for the necessary decisions on each phase.

3. Check this list with your manager or a senior colleague.

4. Consult with someone within the organization whom you consider to be exceptionally politically aware to learn how they have developed the astuteness you observe.

Criterion: Completion of this activity should result in increasing the consistency with which you select the appropriate people for your dealings.

To Achieve Greater Integration Among Subunits Working Together by Minimizing Competition

In order to ensure that organizational objectives are accomplished, you should foster conditions that will facilitate a balance between organizational goals and organization needs, and minimize disruptive competitions between the subunits of the total organization.

To ensure intergroup harmony and prevent conflict, the next time you are assigned a project that requires the combined effort of several subunits:

1. Ensure high interaction and frequent communication between units.

2. Deemphasize competition between units by promoting inter-group collaboration and an atmosphere of openness and trust.

3. Emphasize the need to pool resources to maximize effectiveness.

4. Rotate members among groups or units frequently.

5. Give recognition on the basis of the help that groups give each other, rather than their individual contribution.

6. Acknowledge and praise units for their contributions to the total effort rather than individual effectiveness.

Criterion: Completion of this activity should result in projects proceeding with greater intergroup harmony and cooperation.

To Anticipate and Prepare for Upcoming Changes by Using Formal and Informal Communication Networks

Once you have acquired an ability to cope with unforeseen situations as they crop up, it is possible for you to begin turning more attention toward anticipating the unexpected. One of the best avenues through which you can pick up on clues regarding upcoming changes is via the communication network of the organization. If you increase your detection of warning signals, you will be aware of and prepared for any necessary modifications to your work plans.

1. Be alert to all information relevant to your area of assignment picked up in conversation with other personnel over the next 2 months. For instance, you might hear of a staffing problem in one of the service groups you depend on; or you might discover that the organization has signed a large contract which, although unrelated to your area, will use some of the same facilities you are using.
2. Record all potential red flag issues seen in written memos, correspondence, and reports. For instance, policy changes and/or organizational shifts should always be looked at from the perspective of possible impacts on your area of responsibility.
3. You might, for your own use, write down what you heard or read and the source. Record potential ramifications as well as the action that you propose to take to prepare for these. If you feel that no action can be feasibly taken at this time, state this.

Criterion: Completion of this activity should result in an increasing number of instances in which you were aware of and prepared for necessary modifications to your work plans.

To Develop More Forceful Personal Impact on Others by Appropriately Asserting Your Ideas

To develop a more forceful and dynamic impact on others, you need to become more assertive in groups.

1. You should make a point of sharing your good ideas often in groups. Impact is often related to both quality and frequency of input in a group situation, and, therefore, you should leap into conversation more often.
2. Keep a journal of three or four significant interpersonal or group experiences you had during the week and then analyze them to determine what impact you might have had if you had been more forceful.
3. In situations unfamiliar to you, make a conscious effort to be more consistently persuasive by standing behind your ideas in group meetings. Force yourself to say things even when you are uncertain as to what their impact will be.
4. Have your manager thrust you into new situations where you can practice having more impact on a group. Then, have your manager give you feedback on your performance, particularly on your enthusiasm.

Criterion: Completion of this activity should result in feedback that suggests that you have consistently had more impact in presenting your ideas during the past several months.

To Capitalize on a Thorough Understanding of the Interrelationships Among Organizational Units and Groupings

Consider employing your understanding of the interrelationships between the various units and groups of the organization by conducting orientation seminars for new employees and/or employees transferred to your area of assignment for a particular project.

1. Prepare an outline of your proposed presentation. Minimally include an overview of:
    a. Available support services
    b. Service organizations such as purchasing, fabrication, etc.
    c. Interactions with other organizations
    d. Vendors with whom you typically negotiate
2. Draw up organizational charts showing the relationship between various units, as well as the names and titles of individuals involved.

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3. Ask your manager to monitor your first orientation seminar so that they can later provide you with feedback and suggestions for additional input into your presentation. You might also consider preparing a publication based on your seminars so that employees new to your area will have written material on hand to help them in their own efforts at coordinating their work efforts with others.

Criterion: When you have conducted two orientation seminars with positive feedback from your manager you will have completed this activity.

HUMAN RELATIONS/COMMUNICATION 2

A. ORAL COMMUNICATION

- Improving listening skills
- Enlarging vocabulary
- Organizing and clarifying ideas to avoid miscommunication
- Developing the ability to speak extemporaneously
- Strengthening formal presentation skills

B. WRITTEN COMMUNICATION

- Mastering skills in grammar, spelling, and punctuation
- Building vocabulary
- Improving style and organization in writing
- Writing clearly and concisely
- Providing complete and accurate information

C. COOPERATION/INTERACTION WITH OTHERS

- Increasing effectiveness of teamwork through cooperation
- Reducing incidence and impact of interpersonal problems
- Observing nonverbal interactions
- Developing and capitalizing on smoother working relationships

D. REPRESENTING/CUSTOMER COMMUNICATION

- Identifying customers' needs
- Understanding vocabulary in customers' areas of work
- Meeting customer requests and assuring customer satisfaction
- Responding to complaints
- Representing the organization to the community
- Capitalizing on strengths in customer relations

DEVELOPMENT ACTIVITIES

A. ORAL COMMUNICATION

To Improve Listening Skills by Identifying and Correcting Current Weakness 41
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To Improve Listening Skills by Identifying and Correcting Current Weakness

Listening is an important component of the oral communication factor. You should know how to ask questions, probe into the other person's thinking, and to become a good listener.

1. Over the next month, devote 5 to 10 minutes toward the end of the day to review two or three conversations you have had with others. Ask yourself the following questions to help you evaluate how well you were listening in these situations:
    a. Are you waiting impatiently for the other person to be quiet so that you can talk?
    b. Are you in such a hurry to offer a solution that you do not wait to hear the problem?
    c. Are you listening only for what you like to hear?
    d. Do your thoughts take side excursions while the other person is talking?
    e. Do you just pretend to listen?
    f. Do you put yourself in the speaker's place to understand what makes that person say that?
    g. Are you alert for misunderstandings that could arise because the words do not mean the same thing to you as they do to the speaker?
    h. Do you find out what the argument is about--a real difference in opinion or just a matter of stating the problem?
2. Concentrate on correcting the problems you have identified through this process during this 1-month period.

Criterion: Completion of this activity should result in your eventually answering the first five questions in the negative and the last three in the positive.

To Improve Your Listening Skills

Being an effective listener is as important as being a persuasive speaker. Too often in conversation, we are so involved in thinking about what we are going to say next that we miss what the other is saying.

1. Practice really listening when someone speaks to you. Avoid formulating your reply until the person has finished speaking.
    a. Ask yourself, "What would I be feeling if I were saying what they are saying?"
2. Practice the art of reflective listening. Paraphrase the speaker's thoughts back by phrases such as, "Do I hear you saying?" or "It sounds like..."
3. Avoid interrupting; let the person finish what they are saying before you reply. Wait a few seconds to let the other's words sink in before you reply.
4. If you become confused, ask the person to repeat themselves or explain further.
5. If you disagree with the speaker, criticize the ideas and not the person.

Criterion: When you and others feel that your listening skills have significantly improved, you will have mastered this suggestion.

To Improve Conciseness of Speech

If you are concise in your oral communications, the likelihood of getting your message across is greatly enhanced, since wordiness tends to obscure key points and distract the listener.

1. Carry a small cassette recorder to the next meeting you attend so that you can later listen to remarks you made during the meeting.
2. Play the tape back at the conclusion of the meeting. Practice rewording your remarks to make them more concise and less wordy.
3. Make spot checks while listening to your part of the conversation and ask yourself such questions as, "Was this relevant to the main topic that we were discussing?", "Was this helping us to make progress, or was I just enjoying talking?", "How did I get to this point from where we were a moment ago?"
4. Check the volume level of your voice to make sure that it is intelligible and does not drop off at the ends of phrases.

5. Make a concerted effort over the next 2 weeks to be concise in your oral communications.

6. Repeat the recording procedures outlined above at the end of the 2-week period. Compare this tape with your first recording to see if there is a noticeable improvement in your speech patterns.

Criterion: If your oral communications are noticeably more concise at the end of the 2-week period, this will be an indication that you have successfully mastered this activity.

To Enlarge Your Speaking Vocabulary

Enlarging your vocabulary will make you a more interesting and effective speaker. One way to increase your verbal fluency is by embarking upon a vocabulary building program.

1. Use your reading as a source of new words. Keep a dictionary and index cards handy whenever you read, on the job or at home. When you come across an unfamiliar (or vaguely familiar word), note it on one side of the index card. After looking up the definition, write the meaning and the sentence or phrase containing the word in proper usage on the reverse side of the card.

    a. Build your vocabulary at the rate of six words per week. Review the cards weekly, setting aside those that have become familiar. Once a month, conduct a major review of all your cards to refresh your memory and assess the durability of your learning.

2. Supplement this approach with a structured vocabulary building program, such as that found in Readers' Digest. Consider purchasing one of a large number of paperback books devoted to this purpose.

Criterion: When you have learned 50 new words, you will have completed this suggestion.

To Improve Clarity and Organization When Giving Information Orally

When speaking to another individual, the manner in which you present your opinions and ideas will impact the effectiveness of your presentation. As in written communication, the clarity of thought, organization of material, and freedom from distraction caused by incorrect usage will ensure that the message gets through.

1. Over the next month, decide what to say ahead of time whenever this is possible. Take added pains to be sure that your words accurately reflect your thoughts.

    a. Make an effort to speak clearly and slowly enough to be understood. If the information you are communicating is of a technical nature, you may want to speak even more slowly than usual.

    b. Try to keep your remarks relevant and to the point. Do not dilute the strength of your message with irrelevant details or unnecessary tangents.

    c. Be attentive to cues from the person to whom you are speaking. If they look bored or confused, stop and check to make sure the communication process is proceeding without hindrance.

    d. In at least three conversations each week for the next month, ask the listener to paraphrase the main points of what you have said.

Criterion: When three consecutive conversations demonstrate that your main points have been understood and were communicated effectively, you will have mastered this suggestion.

To Avoid Miscommunication

A certain amount of miscommunication is inevitable on any job. When problems from miscommunicating do arise, avoid the natural impulse to dodge the topic out of embarrassment or try to assign blame. Instead, take advantage of the situation to further develop the clarity of your communication.

Follow this procedure five times in the next month in situations where someone has misunderstood you on the job (even if the miscommunication does not cause any real difficulty).

1. Explain to any co-workers involved that as part of your development plan you are working to increase the precision and effectiveness of your communication. Then, ask each of them to relate to you exactly what communication they received from you (or from someone else on your behalf).

2. If more than one individual is involved, determine where the communication went astray--i.e., between you and someone else? between two others?, etc.

3. Determine what was the nature of the problem.

   a. Was insufficient information communicated?

   b. Was inaccurate information communicated?

   c. Was too much unnecessary information communicated?

   d. Did you simply get your signals crossed? (i.e., you said or wrote one thing but the other individual heard or read something else).

4. On a 4 inch by 6 inch index card, write out a brief communications skills development report:

   a. On the front of the card, note what the situation was, where the problem arose, and the nature of the miscommunication.

   b. On the back of the card, write out exactly what you would say (or write) to more effectively express yourself if the situation were to arise tomorrow. Use this exercise to minimize misunderstandings in your future communicating.

Criterion: When you have reduced the number of your miscommunications significantly (with the specific goal to be set by you and/or your manager), you will have successfully carried out this development activity.

To Improve the Ability to "Think on One's Feet"

One way in which you can enhance your professional image is to work to develop your ability to think on your feet--to speak comfortably and effectively extemporaneously.

1. Seek out one ongoing situation on the job or off that requires your extemporaneous participation. For example, become more active on work-related committees, assist in the training or orientation of new employees, or represent organization in community organizations.

2. Before your first meeting, set degree of participation goals for yourself. Initially, for example, vow to speak up at least once in every meeting; later vow to raise an important issue for the group's consideration. Wherever possible, alert a fellow committee member to your current goals before the meeting and ask them to provide feedback afterwards about your performance and achievement of your goals.

3. After each meeting, evaluate the extent to which you have met your goals.

Criterion: When you have successfully met your own degree of participation goals and when you feel comfortable speaking without formal preparation, you will have successfully carried out this development activity.

To Further Develop Strong Oral Communications Skills

Once you have perfected your more formal presentations skills, attempt to develop your ability to speak comfortably and effectively extemporaneously.

1. Talk to your manager about becoming involved in situations where little prior participation is possible. With their assistance seek out situations on the job (or off) during the next 4 months that require your extemporaneous participation. These might include:

   a. Presenting an impromptu speech at a community gathering on behalf of the organization.

   b. Volunteering to fill in as a last-minute replacement in committee meetings, perhaps even in a leadership capacity.

2. Write down a brief synopsis of the circumstances and what you actually said or did whenever you are dissatisfied with the way you interacted in one of these extemporaneous situations. Write down what you could have said to deal more effectively with the situation.

Criterion: As you develop in this area, there will be fewer and fewer instances in which you are dissatisfied with your extemporaneous participation in situations requiring good communications skills.

To Further Improve Strong Oral Communication Skills

To further develop your ability to speak effectively to others especially on topics of a technical nature, assist with the next training class or orientation session.

1. With the individual in charge, choose a topic you feel knowledgeable about, discuss the optimal treatment of the topic for the particular level of expertise of the group, and rough out a content outline.

2. Independently begin putting your presentation together. Before your talk, review your notes with the trainer once again as a check on the appropriateness of the content and language, and to ensure you have not overlooked anything vital or included anything inconsistent with the trainer's views or approach.

3. To move yourself gradually toward the goal of speaking effectively off-the-cuff:

   a. Rehearse your talk so that you feel reasonably comfortable with the content.

   b. During your talk, use notes in brief outline form only.

   c. Encourage questions and discussion during or after your talk.

4. After your presentation, ask the trainer for feedback about the organization and clarity of your talk.

5. Repeat this process three times (or as specified by your manager).

Criterion: Successful completion of this development activity will be indicated by your increased comfort in this public speaking situation and by decreased negative feedback (comments about poor organization or lack of clarity) from the trainer.

To Improve Formal Presentations

Delivering formal presentations to a group is an excellent way to develop your ability to speak effectively to others.

1. The next time you are asked to make a presentation, begin your preparation well in advance. Make an outline of your major points and fill in your outline ahead of time until you are confident that all major points are represented.

2. Gear your presentation to the level of sophistication of your audience. Consider whether the use of a blackboard, flipcharts, or other visual aids will make your presentation clearer. Consider handouts if the material is exceptionally technical or complicated.

3. If you experience hesitation or anxiety in speaking before a group, it would be helpful to rehearse your presentation. Conduct a first rehearsal in private, using a tape recorder to assess your style and content. Nonverbal information can be obtained by speaking before a mirror. If possible, conduct a dress rehearsal for your manager and obtain feedback as to the clarity and effectiveness of your talk.

4. Anticipate reactions and/or questions to your presentation. Be prepared to defend your views and cite sources of information.

   a. In the event that you are asked a question that you cannot answer, admit so rather than clumsily trying to hide the fact.

   b. Demonstrate a willingness to take new ideas into account by soliciting and following up on new ideas and information.

5. When you are unsure of the amount of prior information the audience has at their disposal, ask. Where a diversity of backgrounds exists, it may prove useful to begin with a capsule summary of pertinent information.

Criterion: When feedback from others and your subjective impression agree that your formal presentation is significantly improved, you have accomplished this suggestion.

To Improve Ability to Speak to Groups

You should be able to communicate effectively, thoroughly, and accurately to a group of individuals.

1. Meet with an instructor in training classes for your field.

2. Arrange to assist in conducting such classes over the next month. If your oral communications skills are somewhat weak you might want to limit your participation to a team instructor approach. If you are at a more advanced level, take over a particular class.

3. To help you in this exercise, keep these points in mind:
    a. Discuss with the instructor the particular level of expertise of the group.
    b. Make sure your notes for each lesson are well organized and well prepared.
    c. Do not simply read your notes in class—your goal is to become comfortable and capable of speaking effectively off-the-cuff.
    d. Rehearse your talk so that you feel reasonably comfortable with the content.
    e. Encourage questions and discussion during or after your talk.
4. Sit down with the instructor and elicit constructive criticism after each lesson. Ask for specific feedback about the organization and clarity of your talk.

Criterion: As you improve during this 1-month period, you will find that the number of positive comments that you receive from the instructor will far outweigh the number of criticisms regarding your presentations.

To Improve Oral Communication by Increased Opportunities

Increase your proficiency in oral communication by seeking new opportunities to make presentations.

1. Tackle new assignments requiring you to speak before a group. Accompany your manager to meetings or committees.
2. Represent your manager at a meeting or committee.
3. Participate in an interorganizational project or task force.
4. Represent the organization in a speaking engagement in the community.
5. Coach another individual in their communications skills.
6. Train or orient a new member of your organization.

Criterion: When you have taken on two new responsibilities that require you to speak, you will have accomplished the objective.

To Capitalize on Strengths in Oral Communication

Once you have developed your own oral communications skills such that you feel competent and relaxed in group settings, it would be appropriate to provide guidance to others in this area.

1. Meet with your co-workers in the form of a working team to discuss issues related to working in groups.
2. Review such factors as the responsibility of the chairperson, the responsibility of others to help the chairperson, minute-taking, and other procedures. Discuss with them the principles of being systematic, of support and building on strengths, and of setting in advance criteria whereby a group can measure whether it has achieved its objectives.
3. Sit in on the next meeting of this same working team to observe to what extent they are utilizing your suggestions.
4. Review the group's performance with them at the end of the meeting.
5. Point out specific behaviors that you observed, such as over-talking, leadership struggles, listening, supporting and building on others' suggestions, generating new ideas, and spotting genuine difficulties.

Criterion: As you succeed in this activity, you will find that your input will be needed less and less in subsequent meetings.

To Capitalize Upon Oral Communication Skills

The employee who shows proficiency in communicating orally can benefit from increased opportunity and challenge in the use of these skills.

1. Represent the organization or team when communication with another organization or outside the organization is required.
2. Arbitrate a conflict between two other employees.

3. Organize information gatherings where employees can share knowledge and skills with each other.

4. Train or coach an employee who is new or experiencing difficulty in an area where you have expertise.

5. Provide orientation for a new member of the organization.

6. Take on a particular activity in which customer contacts are more frequent.

7. Once it has been determined how you could become more involved in oral communications, your manager will clarify:

   a. The limits of your involvement and responsibilities in the selected area(s).

   b. The amount of time to be allocated to the selected area(s).

   c. What type of feedback is required from you concerning progress in this area.

Criterion: Completing one of these suggestions will give you an opportunity to further develop communication skills.

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To Master the Basic Rules of Written English

At a very fundamental level, the clarity of your narrative documentation will be affected by your grammar, spelling, and punctuation. Although these standard subjects have been drilled into us throughout the educational process, time has a way of wearing away at our memory regarding these basic rules of our language.

1. Brush up in these areas by reviewing a textbook that presents the basic rules of English grammar and style. Be sure to pick a book that is suited to your present skills and knowledge. Try to get through at least one chapter every 2 days. Write a summary of the key points in each chapter.

2. Over the next few months, whenever time permits, refer to your notes as you are writing narrative documentation. Make a quick review of your notes to reinforce your memory. Then in writing, whenever you have a query as to correct usage, refer to the appropriate section of your notes.

3. Keep an ongoing record of the grammatical, stylistic, and spelling errors that reviewers find in your documentation. (If your documentation is not being reviewed routinely, ask a skilled co-worker to periodically edit your documentation and point out these types of errors.)

    a. Whenever someone points out an error, write it down in a notebook prepared for this purpose, listing both the correct and incorrect usage. To try to ensure that you do not repeat these same errors, review this notebook at least once a week, drilling yourself on the correct usage.

    b. Also keep track of the total number of such errors identified in each piece of documentation you submit for review. Calculate your average number of errors per page of documentation. This average figure is for your eyes only; it gives you a means of gauging your own improvement.

Criterion: When your average number of grammatical/stylistic/spelling errors per documentation page has decreased to less than one-half of what it was when you began this task, you will have achieved an acceptable amount of progress and may no longer need to keep such extensive records or drill yourself on your notes. Nevertheless, total elimination of such errors is a goal towards which you should continue to strive.

To Build Vocabulary

The number of words that you have at your command is an important factor in the clarity of your communications. The misuse of words often leads to confusion and sometimes to rather serious misunderstandings.

1. Keep both a thesaurus and a dictionary at your desk for easy reference.

2. Note unfamiliar words that you come across in your work and in outside reading. Write each word on one side of an index card. After looking the word up in the dictionary, write its meaning on the reverse side.

3. Prepare 10 or 15 of these cards.

4. Check yourself on the meanings of these words once a day. When you have correctly identified the meaning of a particular word for 3 days in succession, take the card out and add a new vocabulary card to your pile.

5. Incorporate these new words in memos or reports you prepare on the job whenever possible. However, be careful not to use words that may be too difficult for your readers to understand.

6. Keep the vocabulary cards you have mastered in a separate pile. At the end of a month, ask someone to test you out on all of the accumulated vocabulary cards. If you have forgotten any of these, add them once again to the pile of cards you are reviewing daily.

7. Increase your exposure to new words by reading business-orientated publications such as Business Week or Harvard Business Review.

8. Use the word-building section of Reader's Digest for the next few months.

Criterion: Completion of this activity should result in your accumulation and use of a substantially larger vocabulary.

To Increase Knowledge of Grammar

The ability to edit written material depends on a good working knowledge of grammar.

1. Obtain a textbook that presents the basic rules of English grammar and style. The complexity of the book should be suited to your present level of knowledge.

a. Read at least one chapter every week.

b. Summarize the key points of each chapter in the form of written notes. This is to be done in the form of an outline. Each major heading will summarize a particular rule and/or guideline with explanatory notes listed below in point format.

2. Over the next 3 months, whenever time permits, use your notes to help you in the process of editing the written material of others. A quick review of the notes should be made initially. Then, whenever a question as to correct usage comes up, refer to the appropriate section of your notes.

3. At the end of this period, edit a letter prepared for you by a manager. The letter should contain a number of grammatical errors. A similar letter is to be edited every 2 to 3 weeks until criterion has been met.

Criterion: Once you have identified 90 percent of the introduced errors, you will have mastered this exercise.

To Improve Grammar

The clarity of your written communications will be affected by your knowledge of the rules governing the English language.

1. Record all grammatical errors pointed out in work that is returned to you for correction. Both the correct and incorrect usage is to be noted.
2. Review this record at the beginning of each day, so that correct usage can be reinforced.
3. Each time a recorded error is repeated, the date on which this occurred is to be noted across the listed item.
4. After a recorded error has been avoided successfully for a 2-week period, it can be crossed off the list.

Criterion: This exercise should be continued until your written material contains at the most an average of one or two grammatical errors per page.

To Improve Spelling

Misspelled words are one of the most obvious eyesores in written communications. To improve the ease with which written material is read, misspellings must be avoided at all times.

1. Record all spelling errors pointed out in work returned to you for correction. List both the correct and incorrect spellings.
2. At the beginning of each day, cover up the column in which the correct spellings are listed. Write out what you think is the correct spelling for each of the misspelled words.
3. A check mark is to be made each time you correctly spell a listed word. When there are a series of seven checks across from a word, it can be crossed off the list.
4. The words crossed off are to be transferred to a master list. Again, both the correct and incorrect spellings are to be recorded. At the end of a month, test yourself on this master list using the above procedure. Any words that are misspelled are to be reintroduced to the listing that you are reviewing daily.

Criterion: This exercise is to be kept up until your work contains at the most an average of one spelling error per page.

To Review Principles of Usage

Since incorrect habits easily become ingrained, a concentrated effort is often necessary to unlearn them.

1. Review a text of English usage to refresh yourself on stylistic points. Set aside sufficient time so that you will have reviewed the book in a month or less.
   a. Take notes, particularly in the areas where you seem to be having difficulty.
   b. Keep the book handy as a reference in preparing written material.

Criterion: Following this suggestion should significantly improve the stylistic quality of your written work and reduce the incidence of incorrect usage.

To Spot and Reduce the Number of Errors in Usage, Spelling, and Punctuation

Errors can be reduced in several ways.

1. Improve your ability to spot and correct errors by having someone give you a sample of written work containing approximately a dozen unspecified errors. Pick out the errors and correct them. Practice this until you can spot and correct 90 percent of the errors.
2. Keep a notebook of the errors you make in your own written work, and the efforts to correct them.
3. Determine if your errors are an indication of haste and carelessness. Take time to carefully proofread everything.
4. Keep a dictionary and thesaurus handy and refer to them often to avoid mistakes in spelling and word usage.

Criterion: When the frequency of errors in usage, spelling, and punctuation has been reduced by 75 percent in your written work, you will have completed this activity.

To Write Clearly and Concisely

Clarity and conciseness are critical in written communications. In face-to-face communications, confusion can be cleared up immediately. However, it takes more time to clear up confusion caused by a written memo or report.

Use the following guidelines in preparing written communications over the next several months:

1. Make a complete list of the key facts or ideas you want included in the communication.
2. Organize those items in the form of an outline, in such a manner that there is a logical flow from one to the next. This will avoid jarring or confusing the reader.
3. State your main points clearly before going into the details. These main points should stand out and should not be obscured by excess filler material.
   a. Avoid wordiness and unnecessary details.
   b. Avoid unnecessary use of technical terminology. To the extent possible, your writing should reflect conversational speech patterns.
   c. Avoid vagueness and useless generalities.
4. Summarize major points and requests at the end of your message.
5. Double check material before sending it out. If a particular sentence seems awkward upon rereading it, try rephrasing or shortening it.
6. As a check on your procedure, ask your manager or co-worker to read what you have written. Determine whether they are able to pick out the main points.

Criterion: Completion of this activity should result in feedback from others indicating that your written communications have become noticeably clearer and more concise.

To Write in Terms That Are Clear and Understandable to the Nontechnical Reader by Avoiding the Use of Technical Jargon

If technical written material is to be readily comprehensible to the nontechnical person, you must avoid the use of unexplained technical terms and jargon.

Plan to concentrate on clarity in your technical descriptions over the next month.

1. Each time you prepare a written report or other document, check with a nontechnical person to find out if your material is clear. Ask them questions regarding what they think you meant by the technical terminology to determine how well they understood.
2. Seek feedback from nontechnical persons to whom you send your material to find out if you are using terms that are too technical.
3. Enlist the aid of your manager and request that they give you more opportunities to prepare technical reports and written memos addressed to a nontechnical group. Then ask for their feedback on your use of technical terms.
4. Be aware of this tendency and take a second or third look at memos before sending them off.

Criterion: Completion of this activity should result in the nontechnical reader being able to comprehend your written material without question.

To Improve Clarity of Equipment Descriptions

Describing complex equipment in a clear, easy-to-follow manner is one of the fundamental skills of technical writing.

1. Over the next 3 months, each time you prepare a description of equipment, review the following guides:
    a. Write a formal definition of the equipment including a statement of function and describing its general appearance. Use analogies when appropriate.
    b. Describe the equipment from a particular spatial orientation; if details are hidden from view, consider describing the equipment from more than one angle.
    c. Break the equipment into its various components and list these; then present a detailed description of each part.
    d. Specify a point of departure from which subsequent measurements are given since stated measurements are useless unless a reference point is given.
    e. Incorporate sketching where possible to add clarity to the overall description.
2. Note difficulties others have in working with your prepared equipment descriptions during this period. Determine and record the cause. Were relevant details omitted or simply incorporated into the description in a confusing manner?
3. Review this record with the preceding guides prior to beginning future equipment descriptions.

Criterion: When the recorded difficulties that others have experienced in working with your prepared equipment descriptions have been completely eliminated over a 1-month period, you will have mastered this exercise.

To Improve the Organization of Written Technical Material

It is important that preliminary attention is given to the organization of the technical articles, reports, correspondence, etc. which you prepare. The order in which you present your material will then have a rationale and coherence to it that will benefit the reader.

Over the next 2 months, each time you prepare a technical article, report, and/or lengthy correspondence, follow these steps.

1. Prepare a statement that clarifies your purpose in writing; keep this in front of you throughout the organizational process.
2. Write the title of each topic you feel you should address on the top of a seperate index card and list all key points pertinent to the topic that must be handled.
3. Arrange cards according to the order in which the topics should be addressed.
4. Number the key points on each card in the order in which they will be covered; ensure that the order will be a coherent, step-by-step coverage of the topic.
5. Assemble the data and use your outline to estimate the relevance and appropriateness of each item to the assignment.
6. Begin writing following this card outline; refer frequently to your outline so that you stay with your point without excess words.
7. Review your write-up, judge how the preliminary organization of the task speeded up your work and improved its structure.

Criterion: Once you are able to produce an organization which results in one-third less time for writing, you will have mastered this task.

To Improve Clarity of Operational Descriptions

In describing the functions of a device or system, you should use a specific framework for the process. Plan to concentrate on such operational descriptions over the next month.

Each time you prepare an operational description, review the following:

1. Prepare a clear introductory statement of the course and direction of the operation.
2. Prepare a preliminary table to introduce the reader to all terms before they see them in the actual operational analysis.

3. Sketch a diagram of the device or system to add clarity to the written description.

4. Make a preliminary list of all the operational parts of the device or system and order these in terms of their sequence in the operation.

Ask your manager and/or a co-worker skilled in technical writing to review with you the clarity of each of the operational descriptions you prepare during this period. Ask them to provide you with very specific feedback as to the strengths and weaknesses of your prepared descriptions. Be sure that they give you specific suggestions for change. Note these comments in written form and attach them to a photocopy of the operational description.

Criterion: When the number of critiques to a series of operational descriptions has declined by three-fourths, you will have been successful.

To Provide Complete and Accurate Information

When others ask you to provide them with information, it is your responsibility to ensure that the information is complete and accurate. If the information is inaccurate or leaves out pertinent details, there will be repercussions in the work of others.

Each time you are asked to provide information over the next 2 weeks:

1. Have a clear definition in mind of what is required. Keep a note pad handy to make notes during the request. Do not rely on your memory. Afterwards, while the request is still fresh in your mind, review your notes and add to and clarify your written comments.

2. Make sure the information you obtain is reliable. If you are copying data from written sources, always double check your notes against the source material. If you are obtaining information over the phone, restate the information to the person on the other end to ensure that you have heard correctly.

3. Refer to your original notes to make sure you have obtained all the information that was requested.

Criterion: If you are providing more complete, accurate information, others will have to ask fewer clarifying questions, and you will not receive feedback that you have provided inaccurate information.

To Provide Accurate and Meaningful Tables, Charts, and Slides Through Definition and Evaluation

When you are asked to write a report or other document, the use of visual aids can help to clarify and add impact to your presentation. It is your responsibility to ensure that the pictorial presentation of your material is accurate and meaningful. If your charts, slides, tables, etc. are inaccurate or without purpose, your efforts may cause confusion and be counterproductive.

Each time you prepare a visual aid over the next month:

1. Have a clear definition in mind of what meaningful function it will serve.

2. Prepare preliminary samples to help you determine which approach (table, graph, slide, etc.) will most effectively add clarity to your written or oral description.

3. Decide what you want the visual aid, referring to your notes to ensure it is accurate and includes the information you intended.

4. Prepare the visual aid, referring to your notes to ensure it is accurate and includes the information you intended.

5. Ask your manager and/or a colleague skilled in the preparation of visual aids to review with you the clarity and accuracy of the materials you have prepared during this period.

6. Ask them to provide you with very specific feedback as to the accuracy and usefulness of your aids. Be sure that they give you specific suggestions for change.

Criterion: Completion of this activity should result in the virtual elimination of reported confusion and inaccuracies which others experience in working with your presentations.

To Improve the Effectiveness of Your Written Communication Through the Use of Graphs and Charts

Some material benefits greatly from being presented in more than one form. Becoming familiar with graphic representation increases the interest and flexibility of your presentation and conveys information more clearly.

1. Over the next 2 months, make a concerted effort to include tables, charts, or graphs in your written presentations.
    a. If you are unfamiliar with graphic methods, consult books or other publications which contain examples.
2. When you run across a chart or graph that represents a useful format for your work, make a copy for future reference.

Criterion: When four samples of your work contain information in graphic form, you will have completed this task.

To Improve the Link Between Thinking and Writing

Sometimes the thoughts are clear but get stilted in putting them down on paper. A useful remedy for a stilted writing style is to make the written form closer to speaking.

1. Use a tape recorder to express yourself orally before committing yourself on paper.
2. If your writing style is too formal or awkward, use this technique to make it sound more like speaking.

Criterion: Following this suggestion should make your written communication clearer and easier to read.

To Gain Practice in Capturing Main Topics

Practice and feedback will help you improve in this area.

1. Take notes at a meeting you attend and prepare a summary treatment. Prepare a summary statement from a presentation you have read.

Criterion: Following this suggestion should enable you to recognize the mainpoints and highlight them in your writing.

To Extend Editing Skills

Minimally, editing written material requires correcting technical mistakes such as misspellings, improper punctuation, and/or poor grammar. If you take editing one step further, the emphasis is on introducing an element of clarity and conciseness to the written communication by picking up on awkward sentence construction, concentrating on the proper choice of words, and eliminating unnecessary words. If you have displayed a strong ability to improve written material in its more technical aspects, it is feasible that your expertise could be broadened to include this more advanced form of editing.

1. Meet with your manager to see if arrangements can be made for you to do more extensive editing of the written material received over the next 3 weeks.
2. During this trial period, mark all suggested changes with a pencil on the original copy. The changes are to be reviewed with the original writer before the material is typed in final form.
3. At the end of this trial period, meet with those individuals whose work have been editing. Any problems you encountered in the editing process, the extent to which the edited material conforms to the original intent of the writer, and the amount of clarity you have been able to introduce to the material are to be reviewed. It should also be determined whether you should continue checking with the original writer before material is typed in final form, or if the nature of the changes that you have made during this period suggests that this review is no longer necessary.

Criterion: If you have been successful at extending your editing skills, the comments you receive from the original writers should indicate satisfaction with the prepared revisions.

To Improve Writing Directions for Others

In writing instructions and/or providing directions to others, you must ensure that they are complete and accurate.

1. Write instructions for an elementary work-related task. Pretend complete ignorance of how to go about this process and follow only the directions you have written.

2. Write instructions for a more complex work-related process; again pretend total ignorance of the process and follow only the written directions. In writing the instructions:

    a. Prepare a title that states the overall objective of the instructions.

    b. Put all supporting information into an introductory paragraph.

    c. Write instructions in discrete, numbered steps.

    d. Do not omit steps; do not assume knowledge that the reader may not have.

    e. Define technical terms that you feel may be new to the reader.

    f. Use action verbs and simple, direct words.

3. Ask a co-worker to follow the instructions that you have prepared. Each time they must stop due to incomplete and/or misleading directions, make a note of the inadequacies in your prepared instructions and prepare new instructions.

Criterion: When your written directions enable your co-workers to perform tasks without any hesitancy, you will have achieved proficiency.

To Improve Style of Technical Writing

If your written material is to be readily comprehensible, you must give some attention to the style of your technical writing.

1. Obtain a book covering the basic principles of grammar and style. Recommended listings under "Readings" at the end of this factor include: The Elements of Style (W. Strunk and E. B. White, 1972) and Modern Technical Writing (T. A. Sherman, 1975).

2. Using this book as a guide, define in point form the correct style you wish to implement in your technical writing. Ensure that this formal definition is completed within 2 weeks of beginning this exercise. Your definition could include points such as:

    a. Keep sentences to short or medium length; paragraphs should generally contain no more than five or six sentences.

    b. Use complete sentences at all times.

    c. Avoid cliches and words with vague meanings; search for the precise word.

    d. Define key terms and show the definition through examples.

    e. If particular technical terms are used with which the reader may be unfamiliar, give definitions.

3. Review the prepared style definition prior to beginning any extensive technical writing over the following 2-month period.

4. Compare the completed written material with the defined style points. Determine whether the established guides have been adhered to.

Criterion: Once you have successfully adhered to each of your established style points in three successive pieces of technical writing, you will have been successful.

To Capitalize on Technical Writing Expertise

If you have received favorable comments from your manager and professional colleagues regarding the clear manner in which you transform raw data into written form, consider ways in which this expertise could be put to more use.

1. Talk to your manager and see if an arrangement can be made in which more of your time is devoted to preparing technical material. For instance, you might provide support and training for a colleague who has difficulty in preparing reports or other documents. It might be appropriate for you to become more actively involved in preparing written proposals for customers or assisting in the preparation of manuals and/or training aids on new corporate products.

2. Offer to assist peers in the preceding tasks in this factor.

Criterion: Arrange for a feedback discussion with your manager in 1 month to review the extent to which you have broadened your writing activities and to discuss ideas for future activities in this area.

To Capitalize on Strengths in Written Communications

If you have received favorable comments from others regarding the clear manner in which you are capable of transforming ideas and thoughts into writing, look for ways in which this experience could be put to more use.

1. Negotiate with your manager during the next month for increased responsibility in this area.
   a. Seek assignments to projects that are more complex or more important than what you are already doing.
2. Assist another employee who is having difficulty with their writing skills. Organize or conduct a tutorial or training program for this worker.
3. Write a long-range planning report or similar document for your department or other company area.
4. Use your writing skills to participate in an interorganizational task force or decision-making group.
5. Employ your strong communications ability to improve the flow of information through your work unit.
   a. Author an informal newsletter or a regular feature in an existing bulletin that will keep others up-to-date on new developments in technology, changes in personnel, administrative details, etc.

Criterion: When you have taken on two new assignments or areas of responsibility in the next month, you will have accomplished the objective.

To Capitalize on Drawing Expertise

If you have received favorable comments from your manager and professional colleagues regarding the clarity of your sketches, consider ways in which this expertise could be put to more use.

1. Talk to your manager and see if an arrangement can be made in which more of your time is devoted to design. For instance, you might provide support and training for a co-worker or colleague who has difficulty in preparing clear sketch work.
2. Become more involved in supervising or preparing design work to be incorporated in manuals and/or training aids on new corporate products, etc.

Criterion: Arrange for a feedback discussion with your supervisor in 1 month to review the extent to which you have broadened your work with designs and to discuss ideas for future activities in this area.

DEVELOPMENT ACTIVITIES

C. COOPERATION/INTERACTION WITH OTHERS

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To Improve Discretion and Confidentiality in Communication

Discretion and confidentiality are vital components of effective business communication. Gaining a reputation as a busybody or blabbermouth will lead to others viewing you as untrustworthy.

1. For the protection of individuals and the organization, assume that information obtained in private conversation is to remain private.
2. Ask the speaker if you wish permission to pass on information--to whom and under what circumstances.
3. Avoid the rumor mill; do not be a contributor or even a link.
   a. When an individual comes to you with hearsay, encourage them to check out the information firsthand.
4. If you have gripes or complaints about an individual or policy, let your displeasure be known only where it has the potential to do some good.
   a. In general, think twice about voicing negative thoughts, you may be forced to deal with the consequences.

Criterion: A month free of misunderstanding or embarrassment due to your having passed on information that you should not have will indicate completion of this suggestion.

To Improve the Tone of Communications

The tone of communications can have a strong impact on its effectiveness. If you imply a basic lack of respect for others, the other party is likely to respond defensively, resulting in a breakdown in communications.

1. Make an effort to consider personal impact in a conversation. At times, you may have to bite your tongue when the conversation gets heated.
2. Keep in mind that language that is used comfortably within a circle of friends may not be acceptable in the business setting. Discretion in this area will help get the message across without distortion due to language that offends others.

Criterion: When you and your manager agree that more respect toward others is being shown, the requirements of this activity will have been met.

To Improve Courteous Communication

Proper courtesy is a necessary ingredient of all interpersonal communications. Without it, even the most technically correct interactions will suffer.

1. When it comes to the attention of your manager that you have acted discourteously, they will arrange to discuss the matter with you.
2. Coaching in elements of courteous behavior such as maintaining eye contact, greetings and closings, etc. will be provided if necessary.
3. Determine if less than courteous behavior is a result of hostility or conflict. Express feelings where they can have some positive effect.
4. Role-play situations that you find particularly difficult to deal with to get practice in behavioral alternatives.

Criterion: A month free of reports of discourteous behavior will indicate completion of this suggestion.

To Improve Working Relationships

Cooperation can be improved by building good work relationships among members of the organization.

1. List the people with whom you work relatively closely, and rate the quality and quantity of interaction using the following scale:
   a. 5 - work extremely well together
      4 - work reasonably well together, but room for improvement
      3 - have fair working relationship
      2 - have poor working relationship
      1 - unacquainted with the individual
2. Generate ideas to improve working relationships with specific indivuals. These ideas could include:
   a. Making a concerted effort to accentuate the positive aspects of the relationship. Giving honest compliments could be one way. Another is to talk to others about their personal interests more frequently.
   b. When co-worker's actions are uncomfortable, take care to understand the other employee's motives. Ask for clarification to eliminate the chance that what has been done or said is misunderstood.

c. Recognize that one cannot possibly like and agree with everyone with whom one must work. A little politeness, however, can ease the way for both parties.

Criterion: This suggestion will be completed when your average rating is a 3.5 or better.

To Increase Effectiveness as a Team Member

Effective team work requires more than simply carrying out job assignments satisfactorily. Team work depends also on interpersonal skills and work atmosphere.

1. Ask your manager to assess if your attitude contributes to or detracts from a positive work climate. Some of the indicators of a positive work attitude are:
   a. Takes and gives direction courteously and willingly.
   b. Exhibits a minimum of competitive or griping behavior.
   c. Offers help to others when appropriate.
   d. Demonstrates a positive mood state the majority of the time.
   e. Copes effectively with stress and frustration on the job. (Continues to function well in spite of increased pressure.)
2. Conduct a reassessment 1 month after developing a remedial plan.

Criterion: If this suggestion is followed the result should be a substantial increase in behaviors indicating a positive attitude.

To Improve Cooperation as a Team Member

At times, you may overreact to minor setbacks in your work. Once blown out of proportion, it can have a negative impact on your attitude toward work.

1. Analyze the situation to determine the actual cause of poor attitude. Do you feel slighted somehow, given too much of the "dirty" work, or that your efforts are not recognized and rewarded as effectively as are the efforts of others?
2. Try to feel comfortable enough to deal with your manager directly about this subject. This should be done in a spirit of trying to gain understanding of the situation and of explaining feelings about what has happened, rather than accusing others. Perhaps your manager will be able to help you understand why the initial action that upset you was taken. If not, together you can develop a compromise that satisfies you and still meets the organization's needs. At times, this may be as simple as receiving recognition for special efforts made by you, or it may require that particularly undesirable assignments be given with a trade-off for a more desirable assignment for the next week or month.

Criterion: The requirements of this suggestion will have been met when you and your manager believe that there has been substantial improvement in your attitude toward work.

To Better Handle Interpersonal Conflict

Conflict is inevitable in a dynamic organization, however, if it is not dealt with constructively, it will stand in the way of accomplishing group objectives.

1. Over the next 2-week period:
   a. Keep track of situations that involve interpersonal conflict or tension.
   b. Note in particular your own reactions to such situations. For example, do you back off from your point of view? Do you become drawn into a win-lose confrontation?
   c. Note the outcome of each situation. For example, was the group unable to arrive at a decision? Or, were you quite dissatisfied with the decision that was reached?
2. Over the subsequent 2-week period utilize the following suggestions each time you are in situations involving interpersonal conflict or tension:
   a. Recognize the importance to others of their own opinions and ideas and accept the fact that some people will never be completely persuaded toward your point of view.

   b. State your opinion tactfully when things are not going as you think they should.

   c. Avoid getting into a win-lose frame of mind. Be willing to compromise.

   d. Pause from time to time and ask yourself how genuinely you are listening to others' points of view and attempting to use them as well as your own in arriving at a decision.

3. Prepare a list of outcomes for the second 2-week period. Compare this with your earlier list and note differences that emerge. For example, were you and others able to reach agreement in less time? Were you more satisfied with decisions that were made?

Criterion: If the outcomes of conflict situations were generally more positive during the second 2-week period than during the first 2-week period, you will have accomplished this suggestion.

To Reduce the Incidence and Impact of Interpersonal Problems

Conflict and misunderstanding are facts of life in any interpersonal relationship. The goal is to reduce the number of occurrences and accomplish swift, satisfactory resolutions. When you have interpersonal problems that interfere with effectiveness:

1. Meet with the other person and attempt to discover the source of your differences. Each individual should express personal opinions about how the differences began and the emotional reactions to what happened.

2. Each party should take notes about what the conflict means to the other; concentrate on understanding the other's position without trying to refute it.

3. Each party should develop a list of actions that might be taken to alleviate the concerns expressed by the other. For example, if one employee feels dominated by the other, they should devise plans to take positive action to let the other party know what behaviors are unacceptable.

4. Meet with the other person again and share your plans to alleviate the situation. You should agree on an appropriate course of action and commit yourselves to these actions.

Criterion: If, at the end of 1 month, both parties agree that they are taking positive action to resolve their differences, the requirement for the exercise will be met.

To Resolve Conflicts Among Employees

When conflicts arise, they must be resolved quickly before the difficulties grow to crisis proportions and affect productivity.

Over the next 3 months:

1. Remain in close enough contact with your employees so that you will notice interpersonal problems developing. In particular, be attentive to signs of buck-passing and quarreling.

2. Minimize conflict and rivalry among employees by distributing assignments fairly. No one employee should feel that they are unfairly overworked or is given too much dirty work. Nor should any employee feel that they have too little to do or that there is too little challenge in the work.

3. Initiate discussions with your employees to determine if they think you are utilizing them to the right degree in the way you distribute work within the organization.

Criterion: If you follow these procedures and if all obvious signs of conflict among employees has been eliminated or substantially reduced by the end of the 3-month period, you will have successfully mastered this activity.

To Improve Communication With Managers Regarding Project Progress

The person responsible for the direction of a project must keep their manager advised as to its progress as well as any unique problems encountered.

1. Over the next 3 months institute biweekly program evaluation reviews with your manager.

2. Prepare a brief agenda that these scheduled project evaluation reviews will uniformly take. A sample agenda could include:

   a. Brief summary status of the project

   b. Overall progress in terms of scheduled deadlines

   c. Performance of team members

   d. Project cost performance (notifying/justifying any expected deviations from current budget)

   e. "Red flag" items

3. Refer to this prepared agenda before each meeting to make sure you have all necessary information.

4. Report problems as well as successes. Never try to "butter-up" your report by covering problem areas. Let your manager know that you are aware of these and are working on solutions for them.

Criterion: As your communication with managers regarding project status improves, there will be fewer and fewer instances in which you receive "flak" for failing to provide them with necessary information.

To Develop Smoother Working Relationships With Associates in Customer Contact Units

It is difficult to work effectively with strangers. You can lay the groundwork for working more effectively with associates in other units by making sure that you have had enough contact with the people in these units so that you no longer consider each other to be strangers. You do not need to know every detail of their personal history; you just need to know them well enough so that you would feel comfortable working alongside them.

1. Make a list of the names of all people working in the units or in any units that you might be called upon to work with at some time in the future.

   a. If necessary, ask someone from each of these units to assist you in drawing up a complete list.

   b. Underline the names of those people with whom you have not had enough contact to be fully comfortable in a working situation.

   c. Plan to spend some time with each of them, say at the rate of one per week, until you have gotten to know each of these people well enough so that you could work together effectively if the situation should call for it. Probably, going to lunch or coffee together once or twice is all that is absolutely necessary. Of course, you will want to make a concerted effort to maintain the contacts that you initiate. This simply means having lunch or coffee together periodically throughout the year.

2. After 1 month, meet with your manager and show them your list of names and discuss your progress in getting to know those people whose names are underlined. Continue to meet with your manager periodically to discuss your progress.

   a. Plan to add to your list the names of any new customer contacts and to make an ongoing effort to spend more informal time with these people.

Criterion: When you feel comfortable about working with the customer contacts to which you are assigned, you will have accomplished this goal.

To Improve Awareness of Nonverbal Interactions

By tuning in to the nonverbal signals given by others, you can monitor the impact you are having on them.

1. Over the next week, closely observe conversations between others.

   a. Pay particular attention to the nonverbal signals each gives when the other is talking and whether that nonverbal reaction is accompanied by a possible or negative feeling.

   b. Facial expressions, the amount of eye contact the listener maintains with the speaker, and the listener's postures are to be watched.

2. List (or draw) five nonverbal behaviors you witnessed that you view as possible reactions and would like to see in your listeners and five behaviors that you have witnessed that you view as negative reactions to the speaker (and which you would hope not to observe in your listeners).

3. Continue your development by watching for the nonverbal signals emitted by customers and others with whom you speak. When you encounter a disinterested expression or some other indication that you are turning the listener off, do a quick mental replay of your remarks to determine why.

Criterion: As you become increasingly aware of the signals transmitted through nonverbal means, you should be able to cut down on the number of negative reactions displayed in your listeners.

To Increase Assistance Offered to Others

If you are committed to group goals, slack times are spent assisting others in their work rather than easing off and removing yourself from the work of the group. Putting a premium on free time is dangerous—both to you and the quality of your work. You begin to simply put in time.

1. Spend the next month actively assisting others during your light work load periods.
   a. In order to make this plan operative, inform your manager or project leader of your intentions and ask them to monitor you during this period.
   b. Each time there is a slack period, either ask your manager or project leader how your time could best be put to use or directly turn to one of your co-workers and offer your help. If a co-worker needs assistance on a task that is similar to the work you normally perform, your help would obviously be valued. However, also try to seek out opportunities to learn new skills in the process of helping others. The time spent in training you initially will be well worth the effort if you are then willing to help out when you have the time. Your value as an employee will increase as well as your own sense of competence.
2. At the end of the month, review your attitude towards your own work. Have any new interests been kindled by additional skills you have acquired? Has there been an improvement in your relationship with your co-workers? Do you feel a stronger sense of commitment to the group and the group's goals? Do you consider yourself a more valued and valuable member of the group?
3. Continue to experiment with different ways of assisting your co-workers and to evaluate the effects these efforts are having on your enjoyment of your job.

Criterion: When you find yourself looking forward to and actively seeking opportunities to assist your co-workers because of the impact this has on your intrinsic satisfaction with your job as a whole, you will truly have accomplished this goal.

To Improve Flexibility and Avoid Rigidity by Remaining Open and Receptive to Suggestions of Others

Additional information can sometimes be very critical and make a change of decision entirely appropriate. It is necessary to deal with problems in a flexible and open-minded manner for the sake of overall organizational effectiveness.

1. Recognizing that there is no single set of solutions to most problems, you should be willing to adapt your style to the particular person or problem you are confronting.
2. Attempt to develop a more relaxed, less intent, more attentive approach so that others will not be cowed by your strong opinions on issues.
3. Become more open about hearing the other side of an issue. Try the old technique of switching sides on an issue with a friend and argue for that point of view. Do this until both of you are convinced that you have presented the other side effectively.
4. Seek conversations with your manager to discuss this area. They may be able to give you specific on-the-job examples of excessive rigidity in outlook or in behavior patterns that could be modified in the direction of more flexibility. Try to develop specific goals and objectives in this area with your manager that they will monitor for you.

Criterion: Completion of this activity should result in your recognizing the need for open-mindedness and compromise in your decision making.

To Maintain and Improve the Quality of Interpersonal Relationships Within the Organization by Understanding and Responding to the Needs of Others

Understanding and responding to the needs of others is essential in developing sound interpersonal relationships within the organization.

1. Seek feedback from trusted peers and colleagues concerning your behavior in group situations.

2. Learn to be diplomatic and tactful in your interpersonal relations by confronting the issue instead of the person.

3. While sarcasm has its place, its misuse can offend and even alienate others. It is important that you be judicious in your use of sarcasm.

4. In group meetings, keep a log of the number of times in which you reinforce and strengthen the ideas of other members of the group and the number of times in which you simply assert and reassert your own ideas. You should work toward increasing the frequency of the former and decreasing the frequency of the latter.

5. Make a conscious effort to become more affiliative and friendly with others. Learn to consider others' feelings before acting and to react to people on a more interpersonal level.

6. When in an interpersonal situation, you should attempt to relax and be yourself.

Criterion: Completion of this activity should result in positive feedback on several consecutive instances of group interaction from your peers and/or manager.

To Capitalize on a Good Working Relationship With a Manager

If you have established a good working relationship with your manager it is possible to use this relationship as a basis for providing support in a more active fashion.

1. Develop at least five ideas as to how you can provide additional assistance to your manager.
   a. Analyze the scope of your manager's responsibilities by listing all of the projects and activities they are engaged in.
   b. For each listed item, try to generate at least one idea as to how you might be of some assistance.
2. Present your suggestions to your manager within 2 weeks.
3. Your manager will determine which of the prepared suggestions they regard as most helpful in supporting your objectives.
4. Once the suggestions have been selected, your manager will clarify to you:
   a. The exact nature of the required input
   b. When you are to begin as well as the projected length of involvement
   c. What type of feedback your manager requires from you concerning your progress in this area

Criterion: When you are providing more support to your manager than you were initially, the requirements of this exercise will have been met.

To Capitalize Upon Good Interpersonal Skills

If you are skillful in dealing with others you can benefit from increased opportunity to use these talents.

1. Seek the opportunity to act as an organizational representative in an ad hoc or standing body in which the organization participates. Consider accompanying your manager to interdepartmental functions.
2. Seek the opportunity to acquaint visitors with the workings of the organization and function as a spokesperson for this organization when the occasion arises.
3. Put your skills to use in community or civic capabilities.

Criterion: Following one or more of the above suggestions will complete the requirements of this activity.

To Utilize Strong Interpersonal Skills

Capitalize on your strengths by helping co-workers who are weak in this area develop this same strength.

Through informal discussions with co-workers over the next few weeks:

1. Emphasize how taking a genuine interest in others' needs, problems, and personal development will lead to a more positive motivational climate.
2. Point out the negative consequences of tactlessness and insensitivity.

3. Suggest ways by which they can resolve interpersonal conflicts that arise.

4. Ask them to keep a journal over the subsequent 2-week period in which they record all significant people situations they become involved in on-the-job and how they handle them.

5. Review this journal with them at the end of the 2-week period. Note to what extent they actually utilized the suggestions you gave them.

6. Avoid direct criticism of how they handled certain interpersonal situations. However, you can tactfully suggest ways by which they might have modified their approach to these situations.

Criterion: Follow-up on co-workers' progress at the end of the 2-week period will indicate completion of this activity.

DEVELOPMENT ACTIVITIES

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To Improve at Identifying Customers' Needs

Oftentimes the requests that customers bring to you are not simple or straightforward. Many customers express general needs to which there are many possible solutions. Alternatively, they may think they know what the solution is without having identified the real, underlying problem. Your ability to provide the best possible solution to the customer depends upon your skill in diagnosing the underlying cause or origin of the problem.

Follow these steps each time a customer presents you with a rather vague request. Keep a record of what you have done and learned at each step.

1. Get a complete statement of the problem and its symptoms, or the need and its implications, from the customer. Also, ask them to describe what they believe is needed to correct or improve the situation.
    a. Force yourself to keep an open mind and record all potentially important details, not just those that support your hunches, about the nature of the underlying problems.
    b. If you are not absolutely sure what the customer means, do not ignore the comment or assume what they must have meant; ask questions to clarify and then rephrase or summarize the speaker's remarks to check your understanding.
2. Avoid jumping to conclusions about the nature of the underlying need. Consider all plausible alternatives.
    a. Generate as many alternatives as you possibly can, even though many of the alternatives may seem far-fetched.
    b. Order your list of all possible solutions, roughly from most probable to least probable and begin investigating the most probable causes first.
3. When you are confident that you have identified the real underlying problem or need, but before you develop or present a solution to the customer, discuss your analysis with your manager or a co-worker whose judgment you respect.
    a. Review with your manager or co-worker the information you have collected as well as the alternatives you generated and the decisions you made.
    b. Ask whether there are any other alternatives you had not listed or any considerations you had not raised in ordering or investigating these alternatives.
    c. Write down these suggestions. Consider their implications and then come to a final decision as to the nature of the customer's underlying problems and the most appropriate application/system for solving this problem. Include in your records a description of your final recommendation to the customer.
4. Continue to follow these basic steps whenever you encounter ambiguous requests, but modify them to conform to your increasing proficiency at clarifying or identifying customers' needs.

Criterion: When you can independently clarify and solve vague customer requests, you will have mastered this suggestion. The best index of your progress will be the extent to which your customers and your manager believe that you have understood and solved the customers' real problems.

To Improve Understanding of Vocabulary in Customers' Areas of Work

Your effectiveness in communicating with customers will improve if you become more familiar with the basic vocabulary or jargon used in your customers' lines of work. Customers' descriptions of their needs often will be phrased in terms drawn from the customers' own areas of expertise: accounting, administration, business management, engineering, personnel, sales and so forth.

Try to increase the number of words and terms from your major customers' lines of work with which you are fully familiar.

1. Keep a notebook for writing down terms and definitions. Develop one notebook section for each line of work or type of customer with which you deal.

2. Read a good introductory textbook in each area in which you are trying to improve your vocabulary. Ask a customer to recommend each textbook to you. As you read through the textbook, make note of the definitions of all terms you do not fully understand. Aim to read one chapter every two days.

3. When talking to customers, jot down all words and phrases they use with which you are unfamiliar. Add these to your notebook. Find definitions for these terms in your textbook or through asking your customers.

4. Set aside a 10-minute period at the beginning of each workday to drill yourself on defining the terms in your notebook.

5. If you have a good relationship with your customers, explain what you are attempting to do and ask them to check the terms in the section set aside for their line of work. Specifically, ask them to revise the definitions as necessary and to suggest any terms you should add to your list. These should be terms they think they would find helpful to use in discussing their information processing needs.

6. After 1 month, show your notebook to a co-worker and have them drill you on the definitions. Continue to keep your notebook up-to-date, adding new terms and definitions as you encounter them. Continue to drill yourself occasionally on all the terms. You might consider periodically circulating a copy of your notebook to your co-workers so they, too, can improve their ability to converse with customers.

Criterion: When you notice a significant decrease in the frequency with which you have to ask customers to rephrase their explanations--that is, a significant increase in your ability to understand your customers' descriptions of their needs--you will have accomplished your goal.

To Improve Awareness of Customer's Need for Equipment Information

One aspect of maintaining good customer relations is the ability to determine whether you could be providing information that would benefit the customer even when they do not ask.

1. For each type of equipment on which you work, write out a brief list of common mechanical problems that may result from, or be aggravated by, improper operation or improper customer maintenance.

2. Review this list with a more experienced co-worker, asking them to tell you about any such problems you have not listed.

3. Consider your major customers, the different types of equipment you work on, their repair histories, and your current feeling about the customers' general level of knowledge about each piece of equipment. Choose three situations in which the customer could benefit from additional information about their equipment.

4. On your next contact with the customer, take steps to provide the needed information or to make arrangements for training or informing the customers' staff.

Criterion: When you have provided additional information to customers in three situations, you will have successfully carried out this development activity.

To Increase Thoroughness in Meeting Customer Requests

It is not always possible to take immediate action on customers' requests. From the time you first receive a request until the time you are ready to begin work on it, you may forget some of the specifics that the customer has mentioned or asked about. These may be details that are pertinent to your ability to successfully fill the request. Perhaps more often, these will be details that seem very salient to the customer but are rather trivial from your more expert perspective. Even in the latter case, when you report back to the customers, they will be distressed and dissatisfied if you omit reference to these aspects.

1. Recognize that your perspective on a problem will often be different from the customer's perspective. Then try to understand, and respond appropriately to, the customer's view of the problem. To enhance your credibility in the eyes of the customers, and to enhance your own effectiveness in meeting requests, try following these steps each time you talk with a customer.

a. Get a clear definition of what is required. Have a pad of paper readily available to make notes during the request. Do not rely on your memory. If you have some questions as to exactly what is wanted, ask it. Trying to save face by covering up confusion is a tactic that rarely succeeds in the long run.

b. If the customer requests something that you know you cannot or will not provide, let them know this immediately and explain why. Do not avoid the issue by fooling yourself into thinking that the customer will forget about that aspect of the request before you report back. Specify exactly what aspect of the request cannot be met and then be sure to take the time to explain why. Do not simply reject that aspect of the request in a curt or offhand manner.

c. If you are unsure about your, or the organization's, ability to handle the request, ask the customer to wait while you check with your manager. Try to avoid creating false expectations on the customer's part. Be sure to get back to the customer promptly as you promised.

d. Review your notes before terminating your initial communication with the customer. Make sure you both agree on the action that will be taken by each party involved, and the deadlines to be met, if any.

e. Immediately after you have received the request, while it is still fresh in your mind, review your notes. Make sure they are legible and complete.

f. If it will require a considerable amount of time to respond to a customer's request (e.g., several weeks), contact the customer midway through this period and reassure them that work is progressing.

g. Once you have finished work on the request, but before you report back to the customer, check through your original notes on the request to make sure you have done all that was required. Then spend additional time organizing the information so that you can present it in a coherent fashion. For example, you might want to organize the information around an outline of the key questions.

h. Consider entering a brief record of the total transaction into a cross-indexed ledger. The record should contain descriptions of the problem and solution. These records may save you and your coworkers from reworking similar problems in the future.

2. Follow the preceding procedure closely for the next month. Keep track of the customers whose requests you have received and met during this period. At the end of the period, make follow-up calls to all these customers for the purpose of getting feedback concerning your handling of the requests.

3. Adopt a follow-up approach that you feel comfortable using. For example, you might state your purpose as wishing to find out whether there is anything else the customer would like to know, or as a follow-up call, checking to see whether the solution to the problem is still working satisfactorily.

   a. If you find that some customers are noticeably more satisfied than others, try to figure out exactly what you did differently when handling their requests. Make an effort to incorporate those behaviors into your future customer contracts. Continue to work to improve your thoroughness in meeting customer requests.

Criterion: Your success in following these suggestions will be reflected by: a reduction in the average number of times you need to contact customers before you are able to present a solution, the timeliness of your responses to customers' needs, an increase in the average level of customer satisfaction with your responses to their requests, and an increase in your own sense of satisfaction with your handling of customer requests.

To Improve Explanations of Products/Services to Customers

You must be able to explain designs of products/services to customers who will have varying levels of technical knowledge. As a result, you must be constantly sensitive to gearing your vocabulary to the customer's technical background. Over the next 3 months, each time you meet with a customer:

1. Ask if there are any questions after you have explained the initial piece of equipment, component, or stage of a system.

2. Classify the reply into one of three basic responses and gear your presentation accordingly.

    a. If the customer appears to be fully in tune with your presentation, continue at your chosen pace and level of technical vocabulary.

    b. If the customer appears impatient and/or bored, adopt a somewhat faster pace and feel free to use more technical jargon.

    c. If the customer appears to be somewhat confused and asks several questions forcing you to go back over the material you have presented, slow down and use more down-to-earth terminology. In this case, be sure to:

        1) Make it clear that you are there to serve the customer.

        2) Encourage the customer's questions and answer them thoughtfully. Never make fun of a question.

        3) Emphasize difficult or key points by slower explanations and/or by repetition.

        4) Ask questions on key factors to make sure that you are understood.

Criterion: As you improve in your presentations, you will notice an increased responsiveness on the part of the customer.

To Improve Skill at Questioning Customers (And Others)

A good question-asking technique will serve the dual purpose of enabling you to more effectively gather information about the customer's experience with the product or service and the customer's needs, and increasing the customer's satisfaction by conveying your interest in what they have to say.

On every customer call for the next week, take the following steps.

1. Ask the customer for their perceptions of any problems and their satisfaction with the product or service in general. In doing so, ask open-ended questions that require more than a one- or two-word response. Begin your questions with words like tell me about or describe and avoid opening words like did, is, etc.

2. Avoid jumping to conclusions about the nature of the problem before you have heard the customer out.

3. Listen closely to the customer's responses. Determine how well you have listened by rephrasing the customer's comments in your own words and then asking them if you have understood; or take notes on the customer's key points and then quickly review your notes with the customer as a check on your understanding.

4. During this week, think about situations in which you communicated effectively by questioning the customer (those situations in which the customer was responsive to you, provided good information to you, where you understood the customer's comments, AND WHERE YOU DID NOT WASTE TOO MUCH TIME IN CONVERSATION) and about situations in which you communicated less effectively. Sometimes this will be due largely to the particular customer with which you communicate, but often the difference between effective and ineffective communicating will be your behavior. Determine which of your behaviors resulted in effective communicating and which resulted in ineffective communicating. Incorporate the effective behaviors into your routine customer-contact performance and avoid the ineffective behaviors.

5. If, when asked, customers seem negative about the organization or service, use the following guidelines in responding.

    a. Never try to rebut the customer's comments on the spot.

    b. Analyze how much of what is being said is "smoke" and how much is real.

    c. Arrange with the customer to address these issues in a later conversation.

6. Follow open-ended questions by probing for specifics, attempting to solicit as much concrete information as possible from the customer.

Criterion: You will have benefited from this activity when your customers are more responsive and provide you with more relevant and extensive information, when you are understanding the customer's remarks, and when, at the same time, you are not wasting too much time in conversation.

To Decrease Time Spent in Customer Conversation

While it is important to maintain good customer relations, it is also important to conduct the business at hand in a minimum amount of time.

If you have difficulty avoiding excessive conversation with the customer, follow these steps.

1. On all customer calls for the next 2 days, keep an eye on your watch. Make a note of how many minutes elapse between the time you arrive and the time you actually begin to conduct business. Or, estimate the amount of time you spend in conversation throughout the call.

2. At the end of the 2-day period, compute the average amount of time spent in conversation.

3. For the next 3 days, work to reduce your average time spent in conversation by at least one-third. To do so, try to conduct business as soon as you can, and engage in as little extra conversation as possible after the completion of your work. Continue to note the amount of time spent in conversation, and at the end of 3 days, again compute average time spent in conversation. Compare these averages with the figures arrived at above (for the first 2 days).

4. If you have not reduced your average times by one-third, think about the calls on which you spent most time in conversation and determine how you could have reduced that time. Continue to work at reducing conversation time until you have successfully reduced your average conversation time over a 3-day period by one-third.

Criterion: When you have successfully cut your conversation time by one-third for a 3-day period, you will have successfully met the requirements of this developmental suggestion--and you should see a corresponding reduction in total time spent per call.

To Become Aware of How One Sounds to Others

Communicating effectively with customers requires a certain amount of diplomacy that, in turn, requires an awareness of the way you come across to others.

1. Obtain a tape recorder or small dictating machine. Record yourself in two different situations during the next week, for example, record one conversation between you and a friend at home and one conversation between you and a co-worker.

2. Do not review the tape at that time. Put the tape away for 1 week.

3. After 1 week, listen to the tape. Listen critically to the:

   a. Tone of voice

   b. Speed with which you speak

   c. Clarity with which you speak

   d. Vocabulary you use

   e. Number of times you interrupt the other person

   f. Number of times you are interrupted

   g. Ways in which the preceding elements differ in the two taped conversations.

4. After reviewing the tapes, write out your own development plan consisting of three ways in which you could improve your conversation (for example, speak more slowly, speak more concisely, do not interrupt so much, do not be sarcastic, etc.).

5. Have a co-worker listen to the tapes and discuss the areas you have pinpointed with them. Solicit their input into developmental activities that address communication problems.

6. For the next week, keep these three improvement suggestions in mind every time you communicate with a customer.

7. After that week, again tape two conversations, put the tape aside for several days, and then listen critically.

Criterion: When the second tape shows marked improvement in the three areas you chose to work, you will have successfully carried out this development activity.

To Improve Customer Relations

The manner in which you interact with customers will affect the customers' impression of the organization as a whole. Hence, it is important that you are responsive to customer requests and exhibit the proper tact and patience required to handle interaction with customers.

1. Your manager will select an individual in the organization who is highly skilled in customer relations.
2. You will meet with the chosen individual to devise a plan that will allow you to learn some of the basic skills required in this area. This might include:
   a. Spending some time observing the chosen individual while involved in customer contacts
   b. Observing and critiquing the manner in which the individual relates to customers
   c. Assisting the individual in handling customer contacts
   d. Critiquing your ability to ask constructive questions to get the information needed to solve problems
3. Write a set of guidelines (general do's and don'ts) based on this learning experience that can be followed in the future to improve effectiveness in customer relations.
4. Present the guidelines to your manager within 2 months of the beginning of this exercise.

Criterion: When you have written a set of guidelines that would be useful in improving customer relations, this exercise will be completed. The true index of effectiveness in accomplishing this goal, however, will be improvements in the working relationships you have with customers.

To Become More Skillful at Handling Irate Customers

It is important to remain calm when dealing with irate customers (internal and external). If anger is met with anger, fuel will simply be added to the fire. Anger met with calm attentiveness will often fade away. The key to retaining your cool in these situations is to block out the anger that is being directed to you and to concentrate on the message that is being conveyed.

1. Ask a co-worker you trust to monitor your behavior the next time you must deal with a customer who is complaining angrily. Pick someone who has a reputation for tact and patience in customer relations. They should also be in your general work area, so that the monitoring can be done in an unobtrusive manner. If the interaction is occurring over the phone, have your co-worker listen on an extension so that they can hear both sides of the conversation.
2. Follow these rules in dealing with the complaining customer.
   a. Initially, spend most of the time listening rather than talking. Periodically, paraphrase the customer's statements. This enables you to check your understanding of what is being said and demonstrates interest in what the customer is saying. The tone in which you restate their statements should contain an implicit "Is this correct?" message to the customer.
   b. Beware of communication barriers. When you interrupt the customer, you disrupt their thinking and exhibit a lack of interest.
   c. Always avoid making premature comments and evaluations. Wait until you have gathered all the information. Then summarize the key points the customer has made. This ensures that you have spent time considering the complaint rather than devoting your efforts into simply preparing a retort.
   d. In assessing and responding to the complaint, concentrate on attending to the message itself rather than the anger that accompanied the message. Try to respond as you would if the complaint had been presented calmly and pleasantly. Do not let yourself argue with the customer. Work with them to derive a constructive outcome.

e. Remember that your goal is to help the customer. You will convey this by following the above-mentioned suggestions. However, wanting to help does not mean agreeing with the customer at all times. When the customer misunderstands the situation or when there are barriers to the solution the customer desires, you must explain this to the customer. In giving the explanation or in disagreeing, first make sure the customer believes that you sincerely understand their perspective.

f. If a customer is obviously wrong or later proves to have been unjustly irate, do not embarrass them in your response.

3. After the exchange has finished, review what happened with the appointed co-worker.

a. Press them to give you further counsel about your style in handling conflict situations. State that you need both positive and negative feedback in order to improve.

b. Ask them to work with you in this manner several times over the next month until both of you are satisfied with your manner of handling irate customers.

Criterion: When both you and your co-worker are satisfied with your skill in handling irate customers, you will have accomplished this goal.

To Convey Greater Self-Assurance in Your Technical Expertise

Conveying self-assurance, confidence in your own technical skills and abilities, is critical if you are to gain the confidence of customers. To evaluate and improve the extent to which you convey self-assurance when dealing with customers, try the following line of action.

1. Have a co-worker you trust listen in on your conversations with customers, especially any conversations in which you expect to feel under stress.

a. Ask your co-worker to identify the portions of the conversation where you sounded most sure of yourself and the portions where you sounded self-doubtful.

b. Analyze and list the actual behavioral differences in your comments from these two portions, the differences in what you said and how you said it. For example, prefacing your recommendations by saying, "I am certain that . . ." as opposed to, "I do not really know, but . . ."; or, speaking loudly and clearly as opposed to mumbling.

c. Make note of the behaviors that lead you to appear self-doubtful. Make a conscious effort to avoid these behaviors in the future.

d. Similarly, make a note of the behaviors that lead you to appear most self-assured. Make a conscious effort to repeat these behaviors wherever appropriate.

e. Continue analyzing your conversations with customers until both you and your co-worker consistently rate your overall appearance of self-assurance as unshakable or able to inspire confidence. You do not want to come across as thinking you are infallible, but you do want to project competence.

2. Make an effort to build your perception of your own competence. It is always difficult to project self-confidence when you do not believe yourself to be competent.

a. Write up a list of all the areas in which your manager believes you to be a competent advisor to customers. Read this list over at the beginning of every workday until you believe it.

b. If you sincerely believe yourself to be lacking in competence in some technical area, you should consult with your manager to learn what you can do to build up your competence in this particular area (for example, through on-the-job coaching from a co-worker; job rotation; courses; readings).

c. Inform your manager if there is anything they can do to enhance your feelings of self-assurance.

Criterion: When you are certain that you are conveying strong self-assurance about your own technical competence while dealing with customers, you will have accomplished this goal. Your success in this respect will be reflected by customers' reactions to you: they will express fewer doubts about your recommendations, they will be more likely to ask for you again when a new problem arises.

To Understand Organization Goals and Policies

You must have a thorough understanding of organization goals and policies so that you can explain them if questioned or right any misconceptions held by people outside of the organization.

Over the next 2-month period:

1. Review major goals and policies.
2. Ask your manager or other knowledgeable individuals to update you on recent policy changes.

Criterion: If you are able to clarify goals and policies for individuals outside of the organization on three occasions over the next 2 months where you previously would not have been able to do so, this will indicate successful completion of this activity.

To Respond Quickly and Accurately to Outside Inquiries

It is important that you respond quickly and accurately to inquiries from individuals outside of the organization, such as customers or members of the local community. By doing so, you demonstrate a personal interest in the concerns of these individuals and in upholding the service reputation of the organization.

Over the next 2 months:

1. Document carefully each inquiry you receive from individuals outside of the organization.
2. Specify the exact nature of the inquiry.
3. Seek an immediate response to the inquiry if you are not able to answer the individual's inquiry.
4. Mark a follow-up date on your calendar to get back with the individual regarding their inquiry if the information is not readily available to you.
5. Maintain files of inquiries according to subject or product. In this way, you can refer to the files and perhaps find the suitable response to a particular individual's inquiry without having to go to someone else for the answer.

Criterion: Review your progress at the end of the 2-month period. You should notice more instances where you have been able to respond more quickly to others' inquiries because you already have similar information on file.

To Assure Customer Satisfaction

Being a good organization representative upholds the good reputation of the corporation and ensures future business through your special efforts to maintain customer satisfaction.

Over the next 3 months:

1. Spend more time than you ordinarily would ensuring that customers are satisfied with their transactions and that their service needs are met.
2. Make a point of phoning customers periodically to see if they are satisfied with the service they have been getting.
3. Respond immediately to customers' questions if at all possible. If not, arrange to get back with the individual within the next few days with your response to the question.

Criterion: Following these procedures over the next 3 months should lead to a gradual improvement in the quality of your customer relationship.

To Exercise More Tact in Written Communications

Effective written communication is an important part of your representation skills. Letters that are well written from the mechanical point of view will make a poor impression on customers and others outside the organization if they contain any element of tactlessness and insensitivity.

1. Think back over the past several months to instances where you encountered difficulties with individuals outside of the organization regardless of who you felt was to blame at the time.

2. Pull copies of all written communications that were exchanged with the individuals over that period of time.
3. Review the letters you wrote to determine if some of them could have been more tactfully worded.
4. Prepare a list of do's and don'ts of letter writing based on your review.
5. Over the next 2 months:
    a. Refer periodically to your list when writing letters.
    b. Pay close attention to subtle differences in word meanings.
    c. Avoid coming on too strong, even if you think you have all the facts.
    d. Ask your manager or co-worker within the organization who has a reputation as a skilled writer to review copies of several letters you prepare during this 2-month period. In particular, they should be attentive to the degree of tact you showed in each.

Criterion: When your manager or co-worker is satisfied that you are doing an effective job of representing the organization through your written communications, you will have mastered this suggestion.

To Respond More Tactfully to Complaints Regarding Organization Goals and Policies

In order to maintain smooth relationships with customers and other individuals outside of the organization, the manager must respond tactfully to their complaints regarding organization goals and policies.

Utilize the following guidelines over the next 3 months each time you encounter a complaint about organization goals and policies from an individual outside the organization.

1. Do not react defensively.
2. Listen objectively to the speaker's entire message before passing judgment.
3. If the complaint has some basis in fact, admit that the organization does have some shortcomings but is trying to overcome them. Thank the person for bringing the problem to your attention and ask them for suggestions for improvements.
4. If the complaint is based on a misunderstanding about the organization, take time to tactfully explain the truth of the matter.

Criterion: Following this procedure over the next 3-month period will indicate completion of this activity.

To Respond More Calmly to Accusations and Complaints From Outside the Organization

Calmness in the face of accusations or complaints is a skill you must develop if you are to project the best possible image in dealing with individuals outside of the organization.

1. Make a list of individuals outside the organization with whom you have had negative encounters (involving accusations or complaints by the individual) over the past few months.
2. Note any patterns that emerge in the list. You may find that you have had several encounters with a particular type of individual.
3. Ask yourself if the problems were due to the personalities of the individuals, or if you overreacted to their accusations or complaints.
4. Each time you interact with one of these individuals over the next 2-month period:
    a. Gather all facts before going into these situations.
    b. Anticipate the concerns the other individual is going to express based on your past experiences with them.
    c. Make an effort to determine the nature and extent of the difficulties beforehand and anticipate what your own response to the situation is going to be.
    d. Listen to the individual's entire message before reacting. If their accusation or complaint is based on a misunderstanding, explain, as calmly as possible, what the situation really is.

Criterion: When you are able to remain calm in normally difficult representing situations on two successive occasions, you will have mastered this suggestion.

To Improve Skills as a Formal Company Representative

Your active participation in community affairs as a formal organization representative is encouraged. In such situations, it is essential that your actions and communications accurately reflect the actual goals and policies of the organization.

Over the next 3 to 6 months:

1. Request the opportunity to accompany your manager to community activities where they are acting as a formal representative of the organization.

2. Observe carefully your manager's behavior in these representing situations.

3. Pay particular attention to how they handle disagreements with other individuals or respond to complaints and accusations.

4. Accompany your manager on several occasions to obtain exposure to a variety of representing situations.

5. Volunteer to represent your manager at a meeting after observing several such situations and knowing the variety of responses that may be required of you.

Criterion: When you have reached the point where you and your manager agree that you can attend a meeting unaccompanied as their representative, you will have mastered this suggestion.

To Broaden Representing Activities

By broadening the range of representing activities which you undertake, you will become proficient in effectively representing the organization in a number of different environments.

1. Meet with your manager to discuss possibilities for your involvement in one new representing activity over the next month. In order to broaden your skills, this should be a representing situation with which you are relatively unfamiliar.

2. Seek initial guidance from your manager and follow up periodically with them on your progress.

Criterion: Assumption of responsibility for one additional representing activity over the next month will indicate completion of this suggestion.

To Capitalize on Strengths in Representing

Capitalize on your strengths in representing by developing co-workers' abilities in this area.

1. Allow co-workers to accompany you to outside meetings that they would not normally attend whenever possible over the next 2 months. These might include, for example, meetings with customers or members of the local community.

2. Discuss in each case why the meeting was called, what position you wish to present, and any politics that might be involved.

3. Review what happened during the meeting. Cover any unexpected events and discuss any discrepancies between what occurred in the meeting and the information you gave the co-workers beforehand.

4. Provide coaching to co-workers on how to project a good organization image and behave in a professional manner when interacting with individuals outside of the organization.

5. Allow a co-worker to serve as your representative at a meeting after they have accompanied you to several similar meetings and you are confident of their ability to project a good organization image.

Criterion: When a co-worker reaches the point where they are able to represent you at a meeting with individuals outside the organization, you will have mastered this suggestion.

To Capitalize on an Ability to Handle Customer Complaints

If your interactions with customers show a great deal of tact and patience, it is possible that these refined interpersonal skills could be put to more advantageous use for the organization as a whole.

1. Take responsibility for reporting back to customers who have been upset over some aspect of the organization's functions.

2. Become the initial contact for customers who have developed a reputation for being particularly hard to please.

3. Take on a particular activity in which customer contacts are more frequent.

4. Hold a feedback discussion with the manager in 1 month to review any problems that might have come up in assuming these new responsibilities.

Criterion: Once you have increased involvement in customer relations by assuming responsibility for at least one additional activity, the requirements of this exercise will have been met.

To Capitalize Upon Skill in Dealing With Customers

Employ your strong skills at dealing with customers to help others less skilled in this area.

1. Take the teacher role and use the experience to more completely define in your own mind the factors that contribute to effective customer interaction.

2. After the experience, prepare a handout for others on "Pointers for Dealing with Customers (Irate or Otherwise)." List those behaviors that promote good customer relations and those behaviors to avoid.

To Capitalize on Strong Customer-Relations Skills

If your interactions with customers (internal and external) suggest that you have acquired a great deal of tact and patience, it is possible that these refined interpersonal skills could be put to more advantageous use for your organization as a whole.

1. Talk to your manager to see if you can take on a type of trouble-shooter role for particular aspects of customer relations in your organization.

   a. For instance, they might give you the responsibility of reporting back to customers who have been upset over some aspect of the organization's functions. Perhaps you could become the initial contact for customers who have developed a reputation for being particularly hard to please. Alternatively, you might be assigned to a particular activity in which customer contacts are more frequent.

   b. Explore all the possibilities and, if your manager believes that some of them are feasible, work out the details as to how you can assume these new responsibilities.

2. Arrange for a feedback discussion in 1 month's time to review with your manager the extent to which you have become involved with customer contacts and the success you have achieved in promoting good relations.

   a. Inform your manager of any difficulties you are encountering so they might be able to help you. Also be sure to suggest any new ideas you have as to how the organization's customer relations might be improved.

Criterion: When you believe that your interpersonal skills are being put to better use in promoting customer relations than they were initially, then you will have accomplished that goal.

To Capitalize on High Effectiveness in Conducting Customer Training

If you enjoy conducting customer training classes, it is particularly important that you and your manager consider ways in which your expertise in this area can be put to better use.

1. Tell your manager that you enjoy conducting customer training classes and ask to be considered for more assignments of this nature.

   a. If your organization does not already have someone appointed as a back-up trainer--someone who is sufficiently familiar with all training programs to be able to fill in for co-workers who are unexpectedly called away from training classes they are conducting--you might suggest that you would be interested in filling this type of role. It would require some rearrangement of your work so that you would have time to develop and maintain sufficient familiarity with the material being covered in training classes that others are conducting. You would have to negotitate this arrangement with your manager.

b. If you can identify the particular aspects of customer training that you most enjoy, you and your manager might be able to come up with ideas for related activities that you would enjoy and be allowed to do more often.

2. Offer informal assistance to co-workers who feel anxious about conducting customer training. This could involve simply meeting them for lunch and attempting to quell their doubts by discussing your own rewarding experiences with customer training, or discussing their plans and giving them reassurance.

Criterion: Arrange for a feedback session with your manager in 3 months to discuss the extent to which you have been able to broaden your involvement in customer training activities and to discuss ideas for future activities of this nature in which you get involved.

LEADERSHIP

3

A. DELEGATING/SUPERVISING

- Developing skills in delegating and scheduling of work assignments
- Providing complete and accurate instructions clearly
- Becoming more approachable to employees to improve working relationships
- Increasing employees' commitment and motivation

B. COACHING/TRAINING

- Providing orientation and on-the-job training to new employees
- Identifying developmental areas of employees and meeting these needs through training or coaching
- Guiding and assisting employees to develop and capitalize on skills in leadership and representation

C. COORDINATION

- Identifying resources and team members' talents
- Motivating and communicating with project members
- Increasing interaction between organizations
- Improving and capitalizing on coordination capabilities

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To Delegate Appropriately

Effective planning requires knowing which tasks can be delegated.

When You Are Assigned a Project:

1. List those tasks that can be properly delegated.

2. List the employees to whom tasks may be delegated and the particular skills, experiences, and level of responsibility (for example, "his managed projects" or "has worked only with close supervision") each has demonstrated in the past.

3. Match the tasks to be delegated with the capabilities of the employees, making an effort to provide challenge by assigning tasks which stretch employee capabilities (without overwhelming the employee) where possible.

4. Review this list with your manager to get their feedback on its appropriateness.

Criterion: When you are able to prepare a list of tasks that does not have to be modified by your manager you will have mastered this activity.

To Delegate as Many Duties as Possible

You should be willing to assign significant responsibilities to others. This will leave you with more time to devote to tasks that only you can perform. It also can demonstrate your sincerity in colleagues' development and your confidence in their abilities.

1. Make a list of all the activities in which the organization is engaged. Identify those jobs in terms of the following breakdown:

   a. Duties only you can perform

   b. Duties that could be assigned to others in part

   c. Duties that could be assigned to others entirely

2. Review this list with your manager to determine if your perceptions of organizational activities are in line with their perceptions. Review the breakdown to incorporate any suggested changes.

3. Critique your present practices in terms of the established breakdown. If there are any serious discrepancies, develop a specific plan to implement necessary changes.

4. Maintain a week-by-week record over a reasonable time period of how much time you personally devote to activities in categories a through c.

Criterion: Completion of this activity should result in a steady decrease in the amount of time you devote to activities that could be assigned to others. Most of your time should be spent in performing activities in category a and those activities in category b that cannot be assigned to others.

To Delegate More Paperwork Responsibilities

Many people become needlessly buried by daily paperwork tasks and have little time left over to devote to longer-range planning and decision making. While a certain amount of paperwork is inevitable, you should attempt to cut down on the amount of paper that passes through your hands every day, thereby leaving yourself with more time to devote to other, more important tasks.

1. Make a list of the types of administrative matters you handle on an ongoing basis.

2. Determine which of these matters really need to come across your desk and which can bypass your desk altogether and be directly routed to employees. Not only will this be a timesaver for you, but the employees involved will likely feel a greater sense of independence if they know that everything that comes into the organization does not first have to pass through your hands.

3. Make it clear to employees that they should keep you informed of the actions they take and that they should come to you when a unique situation arises.

4. Assess the success of your attempts to cut down on the flow of paperwork across your desk at the end of a 1-month period.

Criterion: If you are successful in mastering this activity, you should note a significant reduction in the amount of time you devote to paperwork by the end of the 1-month period.

To Determine Categories When Assigning Work

1. Decide in which of three categories the work assignment belongs.
   a. Do as you see fit.
   b. Do as you see fit, but tell me afterwards so that I will be aware of what you have done.
   c. Ask me before you take any action.
2. Communicate this information as you delegate. Keep a record of which category assignments belong in.
3. Have as your goal a gradual progression from category c to categories a and b. Review assignments monthly to determine if it is opportune to change categories.

Criterion: When all of your assignments have been categorized and you have succeeded in placing one quarter of category c with category a or b, you will have completed this suggestion.

To Improve Standard Setting When Assigning Work

Others will know what is expected of them when you can set standards for the quality of their job performance.

1. Prepare a sample of high-quality work that can be made available to others.
   a. In cases where it is not possible to point to a standard, review progress periodically so that you can provide feedback to keep others on the right track.

Criterion: When you have minimized unsatisfactory performance due to misunderstanding or lack of knowledge of standards, you will have accomplished this suggestion.

To Improve the Clarity of Your Job Assignments

Understanding what is expected of them is necessary for co-workers to perform their work adequately, especially when tasks are complex or need to be performed more than once.

1. Prepare a detailed task definition for at least one task for one particular employee selected by your manager.
2. Organize the task into categories of what, why, when, where, who, and how. Have a copy of this made available for the employee and keep one for yourself.
3. When discussing the task with the employee, tackle one factor at a time and use language that the employee is certain to understand.
4. Determine interim and final deadlines and encourage the employee to notify you if problems should arise.

Criterion: When you have prepared task definitions and discussed them for four tasks, you will have completed this suggestion.

To Make Informational Materials Available to Employees

To ensure that others are not delayed in their work, it is important that you make all necessary informational materials available to them.

Each time you assign a task to an employee over the next 2 months:

1. Provide all necessary informational materials when making the assignment or as soon as possible thereafter.
2. Make a note of any additional informational materials requested by the employee relevant to the completion of the task.
3. The next time you make a similar assignment, review your notes to ensure that you provide all necessary and important informational materials.

Criterion: Completion of this activity should result in employees being able to complete their work more quickly or with fewer requests for additional information.

To Ensure Work Assignments Contain All Vital Data

To avoid unnecessary delays in assigned work, all necessary information should be provided to team members at the time of assignment. One way of ensuring that this is done is through the use of written work orders.

1. Prepare written work orders to cover each of the task assignments you make over the next 2 months. A sample work order would include the following.
   a. A brief but complete statement of work

   b. Specified deadline dates

   c. Necessary liaisons with other groups or service units including contact names

   d. References to product specifications, drawings and other documents pertinent to the assignment

   e. Budget considerations

2. Review samples of prepared work orders with your manager for feedback regarding format, clarity, and completeness prior to distributing them to the team members involved.

3. Record all instances in which you failed to provide team members with necessary information during this 2-month period.

Criterion: As you improve in this area, the above record should show a steady decrease in the number of such omissions.

To Provide Accurate Instructions

It is important to provide accurate instructions when assigning a new project. With a clear understanding of what is expected of them, employees are more likely to complete their work quickly and accurately.

Each time you assign a new project to a employee over the next 3 months:

1. Determine what the employee knows and what they need to learn. If the employee has not been involved in a similar project before, more initial guidance from you will be required.

2. Write down all elements of the task.

3. Break the task into subtasks so that progress charts can be maintained on each employee's work.

4. Plan far enough ahead to ensure the availability of all necessary equipment and materials.

5. Specify what deadlines you expect employees to meet.

6. Anticipate questions your employees might have about the new task. Give instructions in an interesting and simple manner. Go slow on details and use language the employee understands. However, do not assume that a lack of questions means complete understanding. Asking the employee to rephrase your instructions is an excellent way to check understanding of what you have said.

7. Walk through the procedures once with the employee.

8. Keep a written record of instructions you gave to the employee, what questions the employee asked, and how you responded to each of these questions. Refer to the notes after each of these tasks, or perhaps one of its elements, has been completed.

9. Put the employee in motion as soon as possible, but stand by during the initial stages and check regularly on their progress.

10. Encourage the employee to come to you if any difficulties or misunderstandings arise. Let the employee know here to get help in your absence.

11. Determine if the results achieved by the employee are in line with what you expected when you initially made the assignment. If they are not, you should try to determine the reasons for the discrepancy.

12. Discuss the situation with the employee involved if you are unable to discover any apparent reasons for lack of understanding.

Criterion: Your measure of success in providing instructions and on-the-job training to employees will be that fewer mistakes are made by them and that they are gradually becoming more independent and more able to assume a greater share of responsibility.

To Ensure Instructions Are Complete

In order to avoid work delays all assignments should be accompanied by a complete set of instructions.

1. Over the next 2 months, each time you coordinate the work of several individuals:

   a. Prepare a folder.

   b. List all information required to provide complete instructions to others. Attach this checklist to the top flap of the folder.

   c. Check off each item of information as it becomes available and place the data in the file.

   d. Prepare an assignment chart based on the file information. This information should include employee, task assigned, required instructions, and scheduled deadlines.

   e. Use the assignment chart in making assignments to ensure all necessary information is distributed to the individuals involved.

Criterion: When you have coordinated three projects/tasks in succession without having any of the individuals involved noting the absence of necessary information, you will have accomplished this goal.

To Provide Sufficiently Detailed Instructions and Explanations

It is important that your instructions and explanations to others are sufficiently detailed. If employees do not have a clear understanding as to what is expected of them, they are more likely to make mistakes and be slowed down in their work.

1. Write up a clear statement of the objectives of the task each time you delegate work over the next 2 months.
2. Organize your points under the job definition categories of: what, why, when, where, who, and how.
3. Have a copy made of this statement for the employee and then use it as a basis for discussing the proposed assignment. Take each category one at a time. Go slow on details and use language the employee understands. Encourage the employee to ask you questions and to generate input into the statement of objectives. Jointly determine what deadlines must be set. Establish whether there is a need for interim reports and the dates on which these should be handed in.
4. Jot down additions and/or revisions to the job statement as they come up in the discussion. Ask your secretary to prepare a final job statement that incorporates the new elements. Have a file set up for the assignment and enclose a copy of the statement therein.
5. Ensure that the employee in charge of the work receives a final copy of the job statement.
6. Keep a running list of instances over the next 2 months that suggest you have failed to provide sufficiently detailed instructions and/or explanations. Write down what you failed to convey and the consequences in terms of work that had to be redone, the quality of the completed assignment, etc.

Criterion: Over the 2-month period, you should notice a steady decrease in the number of instances where you fail to provide sufficiently detailed instructions. You should notice that employees are completing work more quickly and more accurately and that they are asking you fewer questions about how the work should be done.

To Ensure Instructions Are Clear

When instructions or explanations are difficult for the listener to understand, they may be interpreted incorrectly or even ignored. This will cause problems later on that could have been avoided by giving clear instructions in the first place.

1. Over the next week, provide instructions for an assigned task in this way:
   a. Ask the listener to repeat back, in their own words, what it is they have been asked to do.
   b. Correct any misunderstandings.
   c. Ask the listener to repeat the corrected request.
2. This procedure should give you an effective indication as to how successful you are in transmitting instructions in a clear manner.
3. During the following 2 weeks, concentrate on improving the clarity of your instructions by:
   a. Speaking slowly enough so that all words are clear and distinct
   b. Leaving sufficiently lengthy pauses between sentences for the listener to interject question or comments
   c. Using the simplest possible words to express your thoughts
4. Whenever you are giving complex instructions, stop after each major point to check your listener's understanding of that point.
   a. Ask open-ended questions (such as, "Tell me what . . ." or "Now you describe to me how . . ."). Avoid asking simple yes-no questions (such as, "Do you understand?").

5. Try to end your instructions and explanations by having the learner summarize the major points in his or her own words. This gives you a chance to establish, before the learner leaves, whether they have indeed grasped and integrated all of the points you were trying to convey.

6. Continue to ask the listeners to repeat the instructions you provide as described above.

Criterion: During the final week of this period, 90 percent of the instructions should be completely understood the first time they are given.

To Improve at Communicating Expectations

When you are working on a task or project that requires the cooperation of other people, you will find that the work gets accomplished more smoothly if everyone has a very clear idea as to what is expected of them. There are three major things you can do to increase the probability that other people will know and understand what is expected of them. Try to follow these procedures whenever you delegate an assignment or ask someone to do something.

1. Whenever you ask someone to do something or give them some instructions as to how to do something, ask them to repeat back to you, in their own words, what it is you have asked them to do. Then correct any misunderstandings and, again, have them paraphrase the corrected request. Make a concerted effort to avoid simply asking people whether they understand.

2. Whenever you assign someone one small portion of a project, take the time to explain how this portion of the project fits into the total sequence of events. If you succeed in showing the person how this activity is tied to the success of the entire project, it is more likely that they will believe that the task is important and worthwhile and, hence, will be more motivated to work harder to complete it successfully.

3. Whenever you tell someone how to do something that they are responsible for, take the time to tell them why this is the best procedure. If they know the reasons for the rules, they are better able to follow those rules sensibly and to adapt to unusual demands and events. As an added benefit, when you take the time to explain things to people, you convey a respect for them that is likely to earn you greater cooperation.

4. At the end of 1 month, evaluate your successfulness in adhering to the preceding procedures. Consider the reactions that you have gotten from co-workers when you have behaved in the manner suggested above. Ask the people you have given assignments to whether they believe they fully understood your expectations.

Criterion: When you are confident that your co-workers fully understand the requests, instructions, and assignments you give them, then you will have accomplished this goal.

To Improve Others' Understanding of Projects by Clarifying Requirements

When a project for which you are responsible requires the cooperation of many individuals, ensure that each individual understands what is expected of them. Understanding is a key ingredient of their support and for successful accomplishment of their duties.

The next time you must elicit the cooperation of several individuals on a project:

1. Ask each individual to restate to you what they have been asked to do. Correct any discrepancies and misunderstandings. Continue this process until you are both satisfied that the requirements of the task are clear in the individual's mind.

2. Allow for input by being open to suggestions on alternative ways of approaching the task. In fact, you should actively seek such input.

3. Point out to individuals the interrelationships among the various tasks each is performing.

Criterion: Completion of this activity should result in fewer major misunderstandings about what is required to successfully complete your projects.

To Capitalize on Strengths in Providing Instructions and Explanations

Capitalize on your skill in providing instructions and explanations in a clear, concise, and thorough manner by assisting others in their development of such skills.

1. Talk to your manager and have them select an individual they feel could benefit from your expertise in this area.

2. Arrange to have the three of you meet to develop a specific plan as to how this could best be accomplished. This would most likely include:

   a. An initial discussion period in which you would present some of the basic principles and techniques of providing information.

   b. Monitoring periods in which the individual will observe techniques in action.

   c. Monitoring periods in which you will observe their techniques and provide feedback.

   d. A second monitoring session with the individual 1 or 2 weeks later to observe to what extent they have taken your suggestions into account when providing instructions and explanations to others.

Criterion: If the instructions provided by the individual during the second session are noticeably clearer and more thorough than during the initial monitoring session, this will be an indication that this activity has been worthwhile.

To Improve Distribution of Work Loads

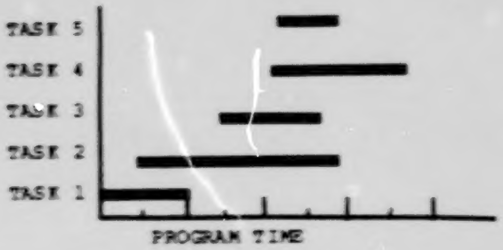
In the scheduling of project tasks, you must be aware of the amount of work you are delegating to team members. A fine line must be drawn between overloading team members with work and ensuring that they are given sufficient responsibilities. Staying within this line requires skillful project direction. The next time you are engaged in project scheduling follow this sequence.

1. Prepare a breakdown of all functional tasks involved.

2. Draw up an organizational chart that lists the names of all team members and the tasks to which they will be assigned.

3. Determine the order in which tasks will be tackled and an estimate of the necessary time to complete these.

4. Draw a tentative Gantt chart in which tasks are listed along the X-axis and program time is distributed across the Y-axis, e.g.:



This chart will most likely be revised and altered. However, it will serve at this time to give you and those with whom you will be working a tentative timetable for project phases.

5. Distribute the work activities. In doing so, take the following items into consideration.

   a. The various levels of expertise that the individuals have. It might be appropriate to assign more difficult tasks to individuals who have had more experience and/or better skills in that area.

   b. The acquired work pace of each individual involved. If you simply allot equal portions of work to each person involved, differences in the speed with which they can handle the work will make for unequal work loads.

   c. The attractiveness of the assignments. Be careful that you do not make it a practice to single out one person to perform all unpleasant jobs, even though they may be the most efficient at handling them. Alternate dull tasks with more challenging work.

6. Talk with each of the team members in the very early stages of the project so that they will be fully informed in advance as to the timing and the type of input that the project will require from them. Use your preliminary Gantt chart and organization chart to give them an overview of the project.

7. At the end of the project, initiate a discussion with the individuals to whom you assigned work. This can be done either on a group or an individual basis.

a. Seek feedback as to the manner in which you distributed work. You might ask, for example, whether the work could have been broken down more effectively; whether anyone was dissatisfied with the work they received; whether anyone felt their special skills were not used efficiently.

b. Incorporate their comments as a further consideration to be taken into account when assigning work in the future.

Criterion: If you have improved distribution work load among team members, this should be reflected in their comments obtained at project completion. The feedback should generally reflect satisfaction regarding task assignments.

To Delegate The Right Amount of Work by Utilizing Feedback

In delegating work, it is important to provide employees with some latitude to carry out assignments in their own way. Not doing so can cause discontent and retard the initiative. It is also important to recognize, though, that at times more guidance may be required on certain tasks.

1. Arrange a series of individual discussions with your employees over the next 2 months to seek feedback on your delegation practices. Specifically, try to determine if they feel you are delegating with too many strings attached and are not providing them with enough freedom to get the job accomplished in their own way. Conversely, would they prefer more guidance and control from you?
2. Pinpoint specific areas in which there appears to be some discontent with your method of maintaining control over delegated work. Concentrate on listening to what employees have to say rather than on defending your present delegation practices. Paraphrase their comments to ensure that you understand their message.
3. Summarize these comments in point form and then prepare a short written statement of each discussion.
4. Make a quick review of these statements each time you delegate an assignment to a employee over the subsequent 2 months. See if there have been comments by this individual regarding the amount of guidance and control you maintain over their work. If they think that they are not given enough latitude, concentrate on toning down your normal impulse to make decisions they are capable of making. Conversely, if an individual has expressed a desire for more guidance, or if the work requires a skill in which they are weak, give more personal attention to this individual in the assignment of the work.
5. Initiate an additional series of discussions with your employees at the end of this second 2-month period. Review the areas on which you have worked and generate comments regarding how successful they think you have been in eliminating discontent with your delegation practices.
6. Make up short statements of the feedback obtained in each session. Compare the earlier and later statements about your delegation practices to determine what changes have taken place.

Criterion: If you have been successful in mastering this suggestion, employees' comments during the second feedback session should indicate that they are now more content with the amount of control and guidance you provide in your delegations.

To Become More Successful at Motivating Project Team Members

When people feel a sense of personal commitment and responsibility to a project they are much more likely to be motivated to work hard in completing their portion of the project and to voluntarily assist their co-workers. Most people begin to feel this sense of personal commitment and responsibility when they have actively participated in the decision making for a project. Also, people who have concrete goals tend to be more motivated, to work harder and longer, than people who are simply told to do their best.

1. Hold a planning meeting before you draw up the final project plan. That is, when you are developing the overall plans for the project, but before you have made many firm decisions, hold a meeting of all major team members.

a. Inform the project members of the project goals, the general constraints, the aspects of the project plan that have already been decided, and the decisions that have yet to be made.

b. Ask for their suggestions, opinions, and comments concerning the remaining decisions. Be honest about requesting advice on these decisions; people are quick to recognize token requests.

c. Take notes on all their ideas. Later, try to incorporate as many as possible into the final project plan.

2. When you are delegating work assignments, instead of assigning the goals and deadlines, explain the general plans and then ask all team members to develop specific goals and deadlines for themselves.

   a. Have them submit these to you for your approval. If you think some goal or deadline is too easy or unrealistic, meet with the person to revise it appropriately; continue to try to ensure that the new goals/deadlines are arrived at jointly. People are much more likely to accept, and feel committed to achieving, goals they have set for themselves than goals you have set for them.

3. Make sure that all goals and deadlines are clearly specified. Goals should be concrete and specific enough so that there is no doubt as to whether they have been reached.

4. Throughout the project, whenever you must make a decision that will affect the work of several team members, hold an informal meeting with all concerned parties.

   a. Inform them of the problem and ask for their opinions as to the best decision. Do not present your own opinion until everyone else has expressed theirs or you may bias their opinion.

   b. Try to reach a group consensus. If consensus is not possible, try to incorporate as many of their ideas as possible in your final decision. Remember, participative decision making generates more motivation than autocratic decision making.

5. Toward the end of the project, meet with the other team members to discuss their reactions to the participative decision making and the concrete, participative goal setting.

   a. Ask them whether, indeed, they did feel more motivated and work harder than they have when these conditions were not present.

   b. Ask them what you might have done differently to increase their motivation even further. Take note of their comments and suggestions.

6. After the project is completed, meet with your manager to discuss your successfulness in following a participative decision making style and in setting concrete, specific goals for the team members.

   a. Discuss the team member's reactions to your efforts: the ones you observed and the ones they brought up in your meeting with them.

   b. Ask your manager to give you their observations as to your effectiveness in motivating other team members as well as suggestions for improving your skills in this area.

7. After the meeting with your manager, write up a new set of guidelines for yourself to follow the next time you are responsible for leading or coordinating a project. These guidelines should be similar to the ones given here but modified to reflect the suggestions of your co-workers and manager, and they should be tailored to your individual situations and needs. Show these guidelines to your manager before you begin leading the next project and, at that time, negotiate with your manager to continue meeting periodically to discuss your progress.

Criterion: If you are consistently and effectively applying these leadership practices you will find that your team members are becoming noticeably more willing to work hard in meeting project goals, feel a greater sense of personal responsibility for the project, and show more evidence of team spirit.

To Become More Aware of the Talents and Skills of Others

In order to effectively utilize the talents of others, you must be familiar with the nature and scope of the talents and expertise they possess.

1. Contact all individuals for whom you are responsible for making referrals or assignments and determine:
    a. The particular areas of expertise of each
    b. Any special training each has received
    c. Past projects they have been involved in
    d. The job-related interests and ambitions of each
2. Prepare a written summary of this information in a form convenient for reference purposes. This could be a chart with headings such as name, shift job title, expertise, special training, and interested in working on.
3. Circulate this summary among all the individuals named and ask them to check for accuracy and to inform you of any additions.
4. When a new person joins the staff, contact them to obtain this information and add them to your list.
5. Every 6 months circulate your list again among all those named and ask them to alert you to any changes you should be aware of.
6. Refer to your list whenever a referral or delegation must be made. In addition, whenever an assignment arises that you could handle yourself, check your list to determine if there is someone else who is capable of taking on the assignment.

Criterion: If you successfully and conscientiously carry out this activity, the assignments you make will better suit the talents and interests of those involved, resulting in more productive and satisfied employees.

To Reduce Competition Among Employees

Lack of motivation can come about when an employee thinks they are being unfairly forced to compete with other employees and/or are being compared with employees who have a strength they lack.

Over the next 3-month period:

1. Delegate (to the extent that it is possible) assignments that will allow employees to capitalize on their strengths rather than having to fight against a weakness. Employees are usually happier and better motivated when working at tasks at which they feel competent.
2. Be willing to provide more support and guidance than usual in cases where it is necessary to delegate work to an employee that requires a skill in which they are weak.
3. Encourage employees to better their own past performances rather than compare their performance with that of other employees.
4. Provide employees with recognition and other forms of reward when they do succeed in bettering their own past performances.

Criterion: If you follow these guidelines, there should be a gradual increase in the quality and quantity of employees' work over the 3-month period.

To Avoid Premature Criticism of Employees

The good delegator allows employees a certain amount of latitude in carrying out job assignments in their own way and does not criticize employees without knowing all the facts. Just as important, the good delegator is tolerant of occasional mistakes by employees, viewing this as a normal part of their learning and development process.

In your interactions with employees over the next 2-month period:

1. Try to learn all the facts before criticizing a employee for taking a particular course of action or behaving in a certain way.
2. Do not automatically blame a employee for poor performance before investigating surrounding circumstances. An unclear understanding of your expectations or conditions beyond their control may be the cause of poor performance.
3. Do not assume that your way of doing things is necessarily the best or only way. Look at results rather than methods.

4. Allow employees to make occasional errors. While you should call attention to employees' mistakes, refrain from being too critical. Learning by trial and error is an effective method for your employees' personal growth.

Criterion: If you follow these suggestions over the next 2 months and the quality and quantity of employees' work stays the same or actually increases during that time period, you will know that this activity has been worthwhile.

To Minimize Last-Minute Decision Making

Making last-minute decisions is an inevitable part of the leadership function. A practical goal, however, is to reduce the number of decisions made in this manner and replace them with systematic planning.

1. Keep a record of your spur-of-the-moment decisions until you have a list that you consider representative.

2. Analyze this record. Devise methods to incorporate as many of these last-minute decisions as possible into regular systematic planning.

3. Maintain the record for another period once you have implemented the above methods into your work planning.

Criterion: If you have mastered this exercise, the number of last-minute decisions required during the second time period will have been cut down significantly.

To Become More Aware of the Talents and Skills of Others

In order to effectively utilize the talents of others, you must be familiar with the nature and scope of the talents and expertise they possess.

1. Contact all those individuals for whom you are responsible for making referrals or assignments and determine:

   a. The particular areas of expertise of each

   b. Any special training each has received

   c. Past projects they have been involved in

   d. The job-related interests and ambitions of each

2. Prepare a written summary of this information in a form convenient for reference purposes. This could be a chart with headings such as name, shift, job title, expertise, special training, interested in working on.

3. Circulate this form among all the individuals named and ask them to check for accuracy and to inform you of any additions.

4. When a new person joins the staff, contact them to obtain this information and add them to your list.

5. Every 6 months circulate your list again among all those named and ask them to alert you to any changes you should be aware of.

6. Refer to your list whenever a referral or delegation must be made. In addition, whenever an assignment arises that you could handle yourself, check your list to determine if there is someone else who is capable of taking on the assignment.

Criterion: If you successfully and conscientiously carry out this activity, the assignments you make will better suit the talents and interests of the employees involved, resulting in more productive and satisfied employees.

To Utilize the Strengths of Others When Delegating Work

Employees are usually best motivated when assigned tasks they feel competent doing or they can learn reasonably quickly based on past experiences with tasks of a similar nature. The manager should not give employees unrealistically difficult assignments. Instead, the manager should attempt where possible to build on strengths already possessed by employees.

1. Review the most recent performance appraisal for each of your employees.

2. Draw up a series of charts, one for each of the job families to which your employees belong. Use a chart similar to that which appears on the performance appraisal forms. However, expand the available space so that you can integrate the information from each of the employees' appraisals onto one chart for each job family.

3. Over the subsequent 3 months:

   a. Analyze new work that comes into the organization in terms of the skills required.

   b. Review the prepared chart of the job family whose responsibility it is to assume such work.

   c. Delegate the work on the basis of this review.

4. At the end of the 3-month period:

   a. Initiate individual discussions with your employees. Explain to them the effort you have made over the past 3 months to take their strengths into consideration in assigning work.

   b. Try to determine from these discussions whether you have been successful in offering assignments that make the best use of employees' individual talents.

   c. Note any changes over the 3-month period in the quality and/or quantity of employees' work.

Criterion: If you have been systematically trying to take employees' strengths into account in assigning work over the 3-month period, you should notice a gradual increase in the quantity and/or quality of their work.

To Assign Work With Increasing Efficiency

The efficiency with which you assign work will affect morale as well as impact the quality and quantity of work that is accomplished.

1. Over the next month ask yourself the following questions to decide if work is being assigned most efficiently. Remember to supplement your impressions with feedback from co-workers.

   a. Are some of the people you are supervising over-worked while others do not have enough to do?

   b. Are tasks being assigned to one co-worker that might be handled more profitably by someone else?

   c. Are some people stalling in order not to run out of work?

   d. Are you delegating enough responsibility and decision-making power to others?

2. In order to gain a more accurate perception of a employees' work load, ask them to prepare a list of job responsibilities and the time allotted to each.

   a. If necessary, reassign tasks to correct inequities, informing the people involved of the rationale for your decisions.

3. Expand your knowledge of co-workers strengths and weaknesses by keeping a file for each employee that contains copies of performance evaluations and your appraisal of their daily job performance.

4. Solicit feedback to decide whether you are perceived as unwilling to delegate sufficient authority. Avoid going overboard, however, by not providing enough guidance and support, particularly if the task is new for the employee. Gradually relinquish direct control as the employee demonstrates proficiency.

Criterion: When the work load becomes more evenly distributed and you can give clear rationale for your choices in assigning, you will have completed this suggestion.

To Capitalize on Strengths in Delegating

Capitalize on your skills in delegating by seeking further opportunities to expand the responsibility and authority of employees. By successfully doing so, you will have more time left to devote to your own managerial growth.

1. Select a employee to accompany you to a meeting within the next 2 or 3 weeks.

2. Inform the employee prior to the meeting as to:

   a. Why the meeting is being called

   b. What position you wish to present

   c. Any politics that might be involved

3. Review what happens during the meeting. Cover any unexpected events and explain any discrepancies between information you gave the employee beforehand and what actually took place.

4. Follow the above steps in each subsequent meeting the employee attends with you.

5. Ask the employee to serve as your representative after having accompanied you at several meetings. Be specific as to the areas in which they have the authority to act on your behalf and in which areas they must defer decisions to you.

6. Review what takes place during this meeting.

7. Discuss possibilities for expanding on this activity in the future.

Criterion: When the employee has reached the point where they are able to attend meetings as your representative with minimal prior coaching from you, you will know that you have successfully capitalized on your skills in the area of delegating.

To Capitalize on Strong Scheduling Skills

Put your strong scheduling skills to work to help avoid future scheduling difficulties in your area of assignment. Take a careful look at the kinds of things which have led to problems in the past.

1. List all of the situations in the past 6 months in which scheduling problems occurred. Write out your best estimate of what led to the problem in each of those situations.

2. Consider whether some action can feasibly be taken to diminish the likelihood of such problems in the future. If so, describe briefly the action you propose. If not, indicate that.

3. Consider whether some kind of contingency plan can be developed for more effectively allocating manpower when such a problem does arise. Perhaps a more efficient mechanism is needed for immediately estimating the amount of time likely to be involved when a problem occurs, or perhaps improvements are needed in the manner in which such information is communicated, or in the way in which support groups are deployed. Write out one potential improvement that would enable your group to deal more effectively with such problems when they do arise in the future.

4. Review this work with your manager and take action to implement (or to more formally propose implementation, if that is required) any suggestions they approve.

Criterion: If the number of scheduling difficulties that your group encounters in the future declines, your suggested improvements will have been successful.

To Improve Control Over the Progress of Assigned Work

Your responsibilities do not terminate upon the initial delegation and scheduling of work among team members. To ensure that project objectives are met within established deadlines, follow-up measures must be instituted.

1. Each time you assign work, make sure that time and deadline commitments are understood by the team members. Ask if there are any conflicts in their work schedule that would prevent completing the job on time. If so, work out a solution. See if another deadline can be postponed, more help can be recruited for a particular task, or if overtime is necessary.

2. As part of each work assignment, review the procedure for completing the work and the standards that must be met. After explaining the task, try asking a few questions to make sure that you have gotten your message across, or simply ask the person to restate the instructions in their own words. Correct any misunderstandings immediately.

3. Using a calendar or day timer especially allotted for such follow-up measures, mark down the deadline for each assigned task. Enter check point reminders on selected earlier date pages. Alternately, if you have prepared some type of project time/task matrix, you may prefer to rely on this posted schedule to remind you of control points.

4. Each time you come to a check point, meet with the designated employees to follow up on the progress they have made on the task and to review the work completed so far to ensure that it is being done in the correct manner.

5. After following these steps throughout the project, meet with your manager to discuss the improvements in your control over the work that you assign. Ask for suggestions, including information about the techniques they routinely employ to follow up on delegated work.

6. After this meeting, write up new guidelines for yourself, outlining all the steps you want to be sure to follow in delegating work the next time you serve as project head. These should be similar to the steps outlined above, but personalized to your individual situation and needs. Continue to meet with your manager periodically to discuss both your plans and your demonstrated progress.

Criterion: When you have led three consecutive projects without your team breaking any deadlines or being forced to work excessive overtime to meet these deadlines, you will have accomplished this goal.

To Further Improve Your Directing Skills

You seem to be well organized and comfortable in directing others. Gain further experience and practice in this area.

1. Seek the opportunity to supervise an additional clerical or junior employee for a week.
2. Work with one of your employees to help develop their own directing skills.
3. With the permission of your manager, begin training other individuals to assume some or all of your job responsibilities.
4. Seek the opportunity to use your skills when working with others in new and unfamiliar situations.
    a. Consider working on an interorganizational project or task force.

Criterion: When you have carried out one of the above suggestions, you will have accomplished the objective.

To Ensure That Work Proceeds in Your Absence

While it is nice to be needed, being indispensable may slow down or halt the work of others.

1. For a period of 1 month, post a schedule of times when you will be unavailable. Try to keep to your schedule as much as possible.
2. If you must be unavailable unexpectedly, let other project members know and assign someone to take your place in your absence.
    a. If a team member should run into problems while you are gone, make provisions for providing assistance that will prevent unnecessary delay.

Criterion: When you have returned from unexpected absences three times without employees reporting delays or other problems, you will have mastered this suggestion.

To Increase Employees' Degree of Authority

The successful manager continually seeks out opportunities to expand the degree of authority of his employees. By doing so, you reduce your direct involvement in the activities of employees and thereby have more time to devote to the purely managerial aspects of the job.

1. Determine the degree of authority you typically provide to employees in carrying out major job activities. Use the following breakdown.
    a. Do as you think fit.
    b. Do as you think fit but tell me afterwards so that I will be aware of what you have done.
    c. Ask me before you take any action.
2. Meet with your manager to decide which of the items from category c could be moved up to category b or a.
3. Develop a specific plan by which you can accomplish this transition over the next 3 months.
4. Keep track of the degree of authority you provide to each of your employees in each assignment you make over the next 3 months. Make every effort to concentrate on categories a and b in the assignments you make. Whereever possible, avoid making category c assignments. The method in which you make assignments will, of course, vary depending on the employees with whom you are dealing.

Criterion: Review your progress at the end of the 3-month period. If you have been able to substantially reduce the number of category c assignments yet the quality of employees' work has not suffered because of your lack of direct involvement, this will be an indication to you that you have successfully carried out this activity.

To Ensure That Employees Exercise the Proper Degree of Authority

When given an assignment, employees must have a clear understanding of their degree of authority as it relates to each element of the assignment. Otherwise, they may assume that they have more authority than is actually the case; conversely, they may underestimate their degree of authority and be reluctant to undertake any action on their own.

Each time you delegate an assignment over the next two months:

1. Make sure employees understand which of the following categories their degree of authority falls on each element of the task:
   a. Do as you think fit.
   b. Do as you think fit but tell me afterwards so that I will be aware of what you have done.
   c. Ask me before you take any action.
2. Make a note of instances over this 2-month period where employees' actions suggest that they did not have a clear understnding of their degree of authority.

Criterion: By the end of the 2-month period, instances where employees overestimate their authority should have been eliminated. The number of instances where employees come to you unnecessarily rather than exercising the authority they have been given should be steadily decreasing.

To Determine if Employees Are Taking Proper Course of Action

By staying in close enough contact with employees' work so the manager can intervene if the employees are taking an improper course of action in carrying out assignments. Doing so may prevent later delays or costly mistakes.

Each time you have a question over the next 3 months as to whether a employee is taking a proper course of action in carrying out an assignment:

1. Ask questions. Determine if the employee has thought out the implications of what they are doing as well as what they are doing.
2. Do not assume that your way or doing things is the only way. Learn all the facts before you pass judgment regarding why employees followed a particular course of action.

Criterion: If you are able to successfully intervene to prevent errors in an employee's work at least once over the next 2 months, this will be an indication that this activity has been worthwhile.

To Improve Progress Reviews of Employees

Keeping records of employees' performance over time will help you evaluate their progress.

1. Keep examples of employees' work in a file with their name. On a monthly, or other periodic basis, review progress in the quality and quantity of their work. Discuss your assessment of their progress with employees.

Criterion: When you have accomplished this task for 75 percent of the co-workers for whom you are responsible, you will have met the objective.

To Improve the Meeting of Deadlines

The employee who consistently meets deadlines benefits the organization and company as a whole. Failure to finish tasks on time may slow down the work of others.

1. Keep a record of all deadlines missed for a period of one month. Next, have them determine the cause of the delay.
   a. Were you unaware of the deadline's existence?
   b. Did you run into unanticipated problems?
   c. Did you simply not have enough time to finish on schedule?
2. The manager must ensure that information about deadlines is communicated clearly to the employee and that they understand what is expected.
3. You are encouraged to ask your manager for assistance when you run into problems and inform appropriate persons of the problems as soon as possible.
4. Continue to record missed deadlines for a month subsequent to implementing these suggestions.
5. Participate in setting realistic deadlines.

Criterion: A month free of missed deadlines indicates completion of this suggestion.

To Improve Use of Project Control Mechanisms

Making schedules and monitoring the progress of project tasks are among a project leader's most critical responsibilities.

1. Meet with your manager to review all the different techniques which are suitable for use as control mechanisms on the types of projects that you usually lead. These might be planning techniques such as PERT networks, milestone networks, Gantt charts, and so forth, as well as review techniques such as structured walk-throughs. Consider techniques that are optional as well as those you are required to use.
   a. Get feedback from your manager as to how effectively you have used each of these techniques in the past.
2. Identify the control mechanisms that you want to become more proficient at using.
   a. Ask your manager for suggestions as to how to implement these techniques, and for articles or books you might read to become more familiar with them, and for any other pertinent resources which might help you.
   b. Plan to apply these techniques as soon as suitable projects are assigned to you.
3. As you apply each of these techniques, meet with your manager to seek further feedback and suggestions.
   a. Continue these periodic meetings until you feel confident in your ability to apply all the control mechanisms appropriate for use in the types of projects that you lead.

Criterion: As you improve your skill in using all the control mechanisms at your disposal, you will find that your project schedules are becoming more realistic and that you are better able to monitor the progress of the projects you are leading.

To Ensure Responsibility is Assumed for Routine Tasks

There are a number of tasks in any job that you are expected to handle without being told. It is important to be aware of and assume responsibility for such routine tasks.

1. Meet with your manager to prepare a checklist of all tasks you are expected to routinely perform on your own initiative. The frequency with which each activity is to be performed is to be clearly specified and recorded under each listed item.
2. Over the next 2 months:
   a. Review this checklist at the beginning of each work week.
   b. Determine which of the listed activities should be completed during the week and transfer reminders onto the appropriate data pages of your calendar.
   c. Record on the checklist the time each activity was actually completed.

Criterion: If you have been successful, each task for which you have assumed full responsibility will have been taken care of at the appropriate time interval.

To Improve Monitoring Functions

Monitoring the work of others will help you appraise performance and allow you to correct difficulties before they cause even greater problems.

1. Utilize a desk calendar or day-timer as a reminder to follow through on monitoring responsibilities.
   a. Check this calendar at the beginning of each work day.
2. Remember the objective of monitoring is not to make decisions for others; rather, it is to determine if work is progressing according to schedule and possibly revising deadlines in response to specific problems.

Criterion: When you have scheduled and performed the majority of your monitoring responsibilities for the next month, you will have accomplished this suggestion.

To Increase Acknowledgement of Employees' Progress

If employees realize that their efforts toward improvement are acknowledged and appreciated, their motivation to continue to put forth such efforts will be sustained.

1. Prepare a progress review file for each employee.

2. Obtain periodic samples of each employees' work to place in their file. Write out a brief critique of the various strengths and weaknesses of each work sample.

3. Review these files periodically.

4. If the work samples of employees indicate the quality of their work has improved, arrange to meet with them during that same week. Acknowledge and praise the evident improvement in the quality of work.

5. After such reviews have been operative for a 6-month period, review any change that is evident in employees' attitudes toward their work.

Criterion: If you have been successful, the enthusiasm which employees display on the job should have increased over the 6-month period.

To Keep Employees Better Informed About Relevant Publications

Capable employees are informed employees.

1. For the next month, conscientiously read every publication that has a bearing on your area of responsibility.

2. During the month pick out five articles, technical manuals, or sections of them and call them to the attention of your employees.

3. At the end of the month, contact each employee (in writing or by phone) and ask:

   a. If they read the materials highlighted

   b. If they felt it was worthwhile for you to do so

   c. What types of written material it would be particularly valuable for you to call their attention to

4. Keep a record of their comments and refer to it as you continue to circulate materials of interest.

Criterion: When you have successfully completed this activity and adopted this procedure, your employees will be better informed and more capable.

To Improve Tolerance for and Skill at Handling Opposing Viewpoints

In concentrating on getting the job done efficiently, the tendency is frequently to view those with whom we work as instruments for accomplishing something and to view disagreement from them as a detriment to accomplishment.

To work most effectively with and through others, however, it is important that they feel they can voice their suggestions and criticisms and that those comments receive your thoughtful consideration.

1. The next three times someone comes to you with an opposing viewpoint, hear them out stifling any impatience you may feel and any counterarguments that come to mind. Ask the individual to fully explain the rationale behind their position. Then tell the individual you will consider their comments and get back to them.

2. Sit down and write out:

   a. Where you think the individual is coming from i.e., try to put yourself in the other individual's place and determine what factors motivated their comments

   b. Three advantages of the individual's proposal

   c. Three disadvantages of the individual's proposal

3. Consider the merit of the advantages and weigh them plus the benefit of encouraging the other individual's independent thinking and boosting their morale against the disadvantages.

4. Meet again with the individual to review your listed advantages and disadvantages and to explain the rationale behind your final decision.

Criterion: When you have successfully adopted this technique, others will come to you more freely and frequently with their comments and suggestions.

To Become More Approachable to Others

The task of directing others is made easier if they feel they can freely come to you with problems.

1. Set aside and notify others of a specific time during the week when you will be able to discuss problems and concerns with them. Be realistic about the amount of time you devote to this activity; be cautious not to promise more than you can deliver.
2. Develop the habit of inquiring about the well-being of employees that you supervise. Show your concern for them as people by demonstrating an interest in their lives that transcends job responsibilities.
3. If problems arise because employees fail to come to you for help, determine the reason behind their reluctance to seek out your help. For example, in the past had you been overly critical of mistakes they had made? Had you failed to provide guidance when employees came to you about a problem instead of giving them the impression that this was a problem that would have to be worked out on their own?
4. For each situation, write out how you could have acted to avoid the problem.
5. Contact (in person, by phone or memo) the individuals involved and indicate that you recognize that your own behavior was to some extent responsible for their failure to consult you. Indicate how you feel you could have acted and ask the individual if that behavior on your part would have caused them to consult you. Urge the individual to consult you on such matters in the future and to let you know when they feel that some behavior of yours is discouraging them from consulting you.
6. When serious problems of this nature arise in the future, follow the above procedure.

Criterion: If you successfully carry out this activity, employees will more freely and more frequently consult you and the number of such problems will diminish.

To Take a Personal Interest in Employees

While the manager should avoid prying into employees' personal lives, informal one-to-one chats over a period of time can strengthen the relationship and even increase employees motivation to perform well on the job.

Over the next 3 months:

1. Spend more time than you normally would in informal interactions with employees.
2. Chat briefly with employees before getting down to the day's business.
3. Be willing to talk about employees' personal problems if they bring them up during the course of a conversation. However, your main role should be to listen rather than to give advice.
4. Lunch occasionally with employees and discuss subjects of mutual interest other than business.
5. Have at least one informal interview with each of your employees during the 3-month period. During these interviews, ask about their interests and aspirations and, in general, try to get them to open up about themselves.

Criterion: If these informal chats and interviews have accomplished their purpose, you should feel on friendlier terms with employees by the end of the 3-month period. You should also note more occasions where employees are willing to seek out your advice regarding personal or job related problems because of the greater interest you are showing in them as individuals.

To Give Credit When Credit is Due

People need recognition as well as finding their own satisfaction in their job.

1. Commend others for jobs well done.
2. Make the connection between the work others do and the goals of the company or organization as a whole.
3. Point out to others the uses of the work to which they are assigned and how their performance relates to larger goals.

Criterion: When the work of others is openly met with recognition of a job well done, you will have met this criterion.

To Make Your Criticisims More Constructive

1. If you must criticize an employee's performance, always do so in private.

2. Make the distinction between the individual and their work. Criticism that is perceived as directed against the individual is more likely to be countered with a defensive attitude and less likely to be heard.

   a. Put yourself in the employee's position and ask yourself what you would be feeling if someone were criticizing you in this manner.

3. Allow the opportunity for the employee to respond; you will avoid building resentment caused by lack of a chance to state their position.

4. Inquire as to whether the feedback you are giving is useful.

Criterion: When all of your criticisms over the next month follow these guidelines, you will have met the criterion.

To Improve Employee Motivation

The task of motivating others begins with you. In order for them to approach their work with a positive attitude, you must serve as a model in your role.

1. Assign responsibilities and tasks with enthusiasm.

2. Along with the task itself, communicate the rationale for assigning it to this particular person at this time.

3. Recognize that financial reward is only one of a host of motivators. Self-realization and achievement, prestige and respect, and self-satisfaction are less extrinsic motivators that are important to most people.

   a. Ask yourself what behaviors on your part contribute to these reinforcers.

   b. Prepare a list of things you could be doing to enhance the motivation of others.

   c. Determine what changes in the quality and quantity of interactions with others would contribute to improved morale.

4. Ask yourself, "What is morale today?" If you are reviewing your organization or team with an objective eye, what indications could you see of high or low morale? Determine what changes, no matter how small, would make the work situation a more pleasant and challenging place.

5. Establish a motivating work climate by showing your willingness to give help to employees when necessary. When asked for help, do more than simply state your recommendation. It is often more helpful to serve as a process consultant in helping employees discover the answer for themselves.

Criterion: Completing this suggestion is indicated when you have identified and implemented six changes in your behavior that you think will contribute to increased morale.

To Increase Employees' Commitment to the Organization

Employees who are aware of their contributions to the organization through their jobs are often better motivated to perform well and feel a greater sense of commitment to the organization.

Through a series of meetings over the next 6 months:

1. Inform employees of the use to which the results of their work is put.

2. Explain the interrelationships between organizational activities and activities of the organization as a whole.

3. Point out to employees the interrelationships of organizational groupings. Each has resources others need, and each has needs others can help fulfill.

4. Keep employees informed of new company products and the company's outlook. Being aware of the company's life and progress often brings with it an interest in and concern for the company and a stronger motivation to do well on the job.

5. Keep employees posted on recent decisions and developments within other areas of the company that will ultimately impact on their own activities.

Criterion: Holding informational meetings with employees at least once-a-month over the next 6 months will indicate completion of this activity.

To Develop an Open Attitude About Your Own Performance

By demonstrating to others your willingness to confront your own imperfections, you give permission for them to do the same.

1. Feel free to ask others for help and advice. While it may be a natural tendency to hide one's weaknesses and indecisions, such an attitude is ultimately detrimental.

2. Solicit ideas on challenging problems and assignments to help foster a cooperative atmosphere and discourage nonproductive, individual competition.

Criterion: When you have sought help or advice from three other employees during the next month, you will have accomplished this suggestion.

To Develop Ability to Motivate Employees

To ensure the excellence of the department, it is essential that the manager apply motivational strategies that will cause employees to reach high standards in their work in terms of both quantity and quality.

1. Meet with your manager or another individual who has a reputation as a good motivator of people. Discuss how they apply different motivational strategies to different kinds of people.

2. Work side by side with this individual for a day to observe their motivational skills in action.

3. For the next month incorporate the ideas you picked up during the course of the day's activities into your own motivational efforts as often as possible.

4. Maintain a written record over this time period of positive changes you observe in a employees' behavior and/ or work output.

Criterion: Evidence of positive changes in employees' behavior and/or work output over the 1-month period will be your measure of success in this activity.

To Provide Incentive for Highly Motivated Employees

Highly motivated employees can use their drive and ambition to further their career development.

1. List all the basic skills required for the job.

   a. Consider personal strengths and weaknesses in relation to these skills.

   b. Identify one area where improvement is needed and design a strategy for increasing this skill.

2. Make a second list of skills that are not required but would improve functioning and make you a more useful member of the organization.

   a. Do not limit this list to technical dimensions, but include analytic, communication, and interpersonal skills.

3. Design a plan to develop one of the dimensions identified. Possibilities include course work at local colleges or specialized training functions.

Criterion: When one area from each of the suggestions has been identified and a plan implemented for improvement, this suggestion will have been completed.

To Involve Employees in Decisions

Employees who have a voice in decisions that will directly affect them are more likely to be receptive to the decisions once put into effect.

Over the next 2 months:

1. Show consideration for employees by asking them to give you their viewpoints concerning any difficulties they can foresee in proposed changes. Employees who have been given a chance to provide input into suggested innovations prior to their implementation will likely have a better attitude toward the changes once they are implemented.

2. Keep employees posted on all developments and decisions that directly affect them.

3. Inform employees well in advance of changes that will affect them.

Criterion: Implementation of these procedures over the next 2 months will indicate successful completion of this activity.

To Motivate Employees to Assume Added Responsibility

By motivating employees sufficiently so that they are willing to take on additional responsibilities, the manager is enhancing their own potential for growth within the organization.

Over the next 3-month period:

1. Determine through discussions with your manager which of your own job duties could be delegated to employees.

2. Determine to whom these duties can best be delegated utilizing your knowledge of employees' strengths and weaknesses.

3. Explain to each employee why you think they are the best person to handle the new responsibility.

4. Explain exactly what would be expected of the employee.

5. Determine employees' perceptions of their present work load. If they already feel they have as many responsibilities as they can comfortably handle, they may be reluctant to take on new responsibilities. If this is the case, point out ways in which they could delegate some of their responsibilities to their own employees to allow them more time to devote to the new responsibilties.

Criterion: Delegating at least 10 percent of your present responsibilities to employees over the next 3-month period will indicate successful completion of this activity.

To More Effectively Utilize the Highly Motivated Employee

Employees who consistently demonstrate high motivation can become an increased asset to the organization and company. Expanding the activities will also help keep motivation high.

1. Represent the organization in situations that involve other parts of the company.

2. When appropriate, accompany a manager to interorganizational meetings or task forces.

3. The manager will assign you training or recruitment functions.

4. The manager will provide additional recognition for your superior performance in this area.

Criterion: Implementing two of the above suggestions will indicate completion.

To Become More Successful at Motivating Individual Project Members

When you are trying to get someone to improve their performance--whether that means working harder doing something differently, or doing something more often--praise and other rewards are going to be far more effective than criticism and other punishments. The next few times you serve as a project leader or coordinator, pay more attention to the manner in which you attempt to motivate people.

1. Keep a notebook in which you can record all the times in which you praise and criticize your other project members.

   a. For the first 2 weeks, make an effort to keep complete records of your praises and criticisms, but do not attempt to do anything differently. At the end of this 2-week period, calculate (or estimate) the number of times you have praised and criticized each of your fellow team members.

   b. Over the remainder of the project, make a concerted effort to steadily increase the ratio of praise to criticism.

2. Make a point of looking for instances of performance that meet or exceed your standards and then commenting favorably on them.

   a. Remember to praise acceptable behavior as well as outstanding behavior since you want both types of behavior to continue.

   b. By giving regular positive reinforcement to your co-workers, they will not react so negatively when you must criticize their work. Criticism by itself is not an effective motivator; however, when coupled with liberal praise, criticism can be a powerful means of changing behavior.

   c. Periodically ask your co-workers, whether they believe you are noticing and appreciating their good work as well as noticing the poorer aspects of their performance.

3. Throughout each project, perhaps on a weekly basis, estimate the number of times you have praised co-workers relative to the number of times you have criticized them; check to see whether this ratio is steadily increasing over the duration of the project.

Criterion: When your estimated ratio of praise to criticisms is twice as great as it was during your first 2 weeks on this task you will have succeeded in accomplishing this goal.

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To Provide a Thorough Orientation to New Employees

If you provide a sound orientation to new employees, they will be able to adjust more quickly to their work and surroundings and will be less likely to make mistakes in their work. It is also likely that the new employees will require less of your personal attention after the initial orientation phase and you will thereby have more time left to devote to other important managerial tasks.

Follow this procedure the next three times you orient a new employee to your organization.

1. Provide the new employee with a thorough orientation to your organization and its activities.
    a. Explain organizational goals, policies, and practices to the employee if they are new to the company.
    b. Familiarize them with the history of the organization, its present activities and projects, and the interrelationships between your and other organizations.
    c. Explain the duties of the employee's position and expected standards of performance.
    d. Introduce the employee to their new co-workers and employees.
    e. Tell them who they can go to for help in your absence.
    f. Familiarize them with equipment within the organization and the location of all necessary supplies.
2. Encourage the new employee to ask questions. Be clear and direct in your responses.
3. Provide instructions to the employee in an interesting and simple manner. Go slow on details and use language the employee will understand.
4. Put the employee in motion as soon as possible. However, monitor the employee's progress closely in the initial stages of their job. In fact, walk through procedures with the employee before setting the employee out on their own. When the employee appears to be progressing satisfactorily, you can become less directly involved in their activities.
5. Continue to seek feedback from individuals who are working closely with the employee to determine how well they are grasping the requirements of the job and what additional training or explanations might be required.

Criterion: If you are successful in mastering this suggestion, you should find that each successive new employee is adjusting more quickly to the job, yet at the same time is requiring less personal attention from you after the initial orientation you provided.

To Improve Training Support Given to New Employees

Newly hired employees are often unfamiliar with the procedures, practices, and standards used within an organization. It is important that the new employee receive on-the-job training in these areas.

1. Talk with your manager about providing on-the-job training to new employees.
2. Meet with the new employee to devise a plan that will allow them to learn some of the basic skills required.
    a. Serve as an informal teaching assistant to the new employee.
    b. Ask your manager to observe and critique your efforts in coaching a newly hired employee.
3. Write a set of guidelines (general do's and don'ts) based on this learning experience that can be followed in the future to improve effectiveness in providing training support.

4. Present the guidelines to your manager for review within 2 months of the beginning of this exercise.

Criterion: When you have written a set of guidelines that your manager thinks would be useful in improving on-the-job training support, you will have completed this task. The true index of effectiveness in accomplishing this goal, however, will be the improvements in the performance of new employees that can honestly be attributed to the training support you provide.

To Improve at Giving On-the-Job Training

Newly hired employees often are unfamiliar with the procedures, practices, and standards used with an organization. They may not be proficient at using all the available techniques. Often it is important that more senior co-workers help them out by coaching them and by giving them on-the-job training. If you are not certain as to how to do this, or you do not do it as well as you would like, consider the following suggestions.

1. Design a plan that allows you to learn from someone your manager considers particularly skilled in coaching new employees. For example:
   a. You might simply spend some time observing the more skilled co-worker.
   b. You might serve as an informal teaching assistant to that co-worker.
   c. You might have the co-worker observe and critique your efforts to coach a new employee.
2. Negotiate these specifics with your manager and the co-worker in question.
3. Whatever method you use, your goal is to become aware of (and perhaps write down) a set of general "do's and don'ts" that will help you to improve your effectiveness in giving on-the-job training.
   a. Once you have thought of some general guidelines, meet with your manager and the skilled co-worker to discuss them and to seek additional suggestions.
4. Whenever you work with junior co-workers make a point of asking them how you can help them to develop their skills. Then do your best to follow through on their requests. Continue to seek advice from your manager or the skilled co-worker when you encounter difficulties working with an inexperienced co-worker.

Criterion: As you continue to apply and refine these general procedures you will become more confident in your ability to provide on-the-job training to junior co-workers and will find that they, in turn, are more enthusiastic about working with you.

To Identify How Employees' Skills Can be Improved

The good job coach is able not only to recognize when employees' skills need improvement but also has information about how the improvement can be accomplished.

Each time you must give feedback to employees on specific skills that need improvement:

1. Avoid vague, useless generalities such as "you really should try to improve in this area."
2. Identify beforehand exactly how the improvement can be accomplished.
3. Check on the availability of appropriate seminars, readings, or other materials before your discussion with the employee.
4. Specify what the end product should be. For example, you might request that the employee submit a follow-up report on the remedial activity, including how they intend to apply the new knowledge to the job.
5. Continue to monitor the individual's activities closely enough so you can determine to what extent they have translated thoughts into actions.

Criterion: If employees are still applying what they learned 3 to 6 months later on the job, this will be an indication of your success in correctly identifying suitable remedial activities.

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To More Effectively Provide Assistance and Opportunities for Development

Two important and interrelated aspects of effectively directing others are providing assistance and providing opportunities for development.

1. In the next 2 weeks, contact all employees, co-workers, and trainees for whom you are responsible for giving work directions. Explain your commitment to assisting with their development and emphasize that you are interested both in their current job responsibilities and in assisting with their development in new areas; and that no one will be penalized or thought less of for asking for guidance.

2. With the approval of your manager, distribute a questionnaire for each person to complete on their own time and return to you within 1 week.

   This questionnaire would ask for the individual's name and job, and would require the following information.

   a. A list of the tasks and/or problems that arise on your job in which you would appreciate receiving some coaching or (re) training.

   b. A list of those areas not currently a part of your job in which you are interested in receiving additional information and/or training.

   c. A list of any other topics that you think you or others in the work unit would benefit from reviewing or learning more about.

3. When all questionnaires have been returned to you, compile a master list of all the topic areas mentioned (with no indication of who made the suggestion) and distribute a copy of this list to each member of the group, asking each member to:

   a. Check those areas in which they would be interested in receiving guidance or training.

   b. Circle those topics that they would feel competent to provide assistance or training to others.

   c. Return the checklist within 1 week.

4. When these forms are returned to you, compile them and evaluate each topic according to the amount of interest expressed, and the importance of that training to the functioning of each individual and/or to the group. It may be, for example, that only one individual has expressed interest in obtaining coaching in a particular area--but that this area is one in which this individual must be fully competent to satisfactorily perform their job. This would be a topic rated high on importance.

5. Arrange to meet those training needs you have labeled most important, utilizing the competencies of others in the group wherever possible. That is, pair up those individuals who need the training with someone who has indicated they have the competence and interest in providing that training.

6. Take the topics that are of less pressing concern but of wider interest and work to set up periodic development sessions for providing this training to those who are interested.

7. Repeat the entire survey process annually, but encourage informal feedback about training and development needs.

Criterion: When all interested employees have the opportunity to develop their skills further, you will have successfully completed this development activity.

To Minimize Assignment Problems Caused by Insufficient Training

For employees to do their job well, they must be sufficiently trained in skills that the task requires.

1. For the next week, before making an assignment, jot down a brief description of the skills and level of past experience the job will probably require.

2. Consider the skills and experience of the available individuals. Choose the individual whose background best fits the situation.

3. Write out aspects of this assignment in which this individual may need assistance because of insufficient experience or skill. When making the assignment, alert the individual to those aspects that may be troublesome and suggest where they may go for help (reference materials, customer service, you).

4. After the job has been completed, contact the individual to determine the accuracy of your assessment of the job requirements and of their skills and abilities.

5. At the end of the week, continue to follow this procedure mentally when making assignments.

Criterion: Successful adoption of this procedure will reduce the number of equipment problems and complaints resulting from insufficient training or skill.

To Develop Leadership Skills

Leadership skills are something that most of us learn through doing. This learning can be made more effective, however, if we have someone serving as our mentor during the early period.

1. Ask your manager whether there is someone in the organization with good leadership skills whom you might work with over the next few months. Then, working with both your manager and that co-worker, try to set up a program that incorporates the fol- lowing phases.
   a. An internship in which you will serve as an informal assistant to the co-worker while they are leading or coordinating a project:
      1) Observe as much of your co-worker's leadership as possible, regularly ask them to explain why they are following these particular procedures, and generally encourage them to discuss the leadership of the project with you.
      2) During this entire project, keep a notebook in which you can record the knowledge that you are gleaning from your colleague about the "do's and don'ts" of leading or coordinating a project.
      3) At the end of the project, transform your notes into an organized set of guidelines that you can continue to follow, and elaborate on, in the future.
   b. During the second phase, you should co-lead a project with your co-worker. Both of you should accept equal responsibility for leadership of the project. Look upon this as a time to test out your leadership skills without running any risk. Be sure to explain the situation to all the other project members.
      1) Do not let your co-worker take all the initiative.
      2) Try to make all decisions jointly so that you may become familiar with leading all phases of a project.
      3) Periodically, throughout the run of this project, meet with your manager and co-worker to discuss your progress in improving your leadership skills. At the end of this project, the three of you should reach a unanimous decision as to whether you are willing and able to move on to the next phase immediately, or whether you would prefer to co-lead another project.
   c. In the third phase, assume full responsibility for leading a project; ask your co-worker to become an observer/critiquer.
      1) Ask your co-worker to observe you in action as much as possible, to take the time to discuss your plans with you, and to provide you with ongoing feedback as to your effectiveness in leading this project.
      2) Meet with both your manager and your co-worker periodically so that the three of you can assess your progress and make plans for the future.

Criterion: When you have completed all three phases, and feel confident in your ability to lead or coordinate a project, you will have accomplished this goal.

To Capitalize Upon Strong Leadership Skills

Employees need to develop leadership skills as well as technical skills before they can handle responsibility for larger projects. If your co-workers and manager compliment you on your leadership skills, then you can perform valuable service to your organization by helping your junior co-workers to develop their own leadership skills.

1. Develop an internship program through which you can help your junior co-workers build up their leadership skills. For instance:
   a. Consider allowing junior employees to serve as your informal assistants while you are leading projects so that they may discover some of the basic "do's and don'ts" before they are responsible for leading their own projects.
   b. Consider observing and giving feedback to co-workers the first time or the first few times they are called upon to lead projects.
2. Decide exactly how you would want to conduct this internship program, write up a brief outline, and then negotiate the finer details of the final plan with your manager.
3. After the internship program has been going for a few months, or after your first intern has "graduated", meet with your manager to discuss your reactions to the program. At that time, ask for feedback and suggestions, and consider any necessary revisions in the format of the program.

Criterion: When you believe that you can honestly claim partial credit for improving a co-workers' leadership skills, you will have accomplished this goal.

To Capitalize on Strengths in Motivating Employees

Capitalize on your strengths in motivating employees by working with an employee to develop their skills in this area.

1. Meet with this individual on an informal basis to discuss the strategies you apply to different people and situations.
2. Have the employee spend a day working side by side with you so they can observe your motivational skills in action.
3. Encourage them to apply the techniques they saw as being most effective to their own efforts in motivating employees.
4. Ask the employee to maintain a written record over the next 1-month period of positive changes noted in their own employees' behavior and/or work output.
5. Follow up with the employee at the end of this 1-month period.

Criterion: If your employee has noted positive changes in their employees' behavior and/or work output over the 1-month period, this will be your measure of success in capitalizing on your own strengths in motivating.

To Increase Patience and Tactfulness

For anyone who must train, instruct, or give guidance to others, patience and tact (the art of giving constructive criticism) are critical skills. Any display of impatience and caustic criticism is likely to result promptly in a flustered and defensive learner who is not only going to have difficulty learning anything, but also is unlikely to admit this difficulty to you.

To improve your skills in displaying patience and diplomacy during training situations:

1. Identify a co-worker who has a good reputation for patience, tact, and sensitivity in dealing with others.
   a. As much as possible, watch the way this co-worker deals with other people, particularly in situations where you know that you would be feeling impatient or critical. Notice exactly what they do and how they do it. Afterwards, try to discuss your reservations with them.
   b. Meet informally with this co-worker. Ask how they manage to behave in a patient, diplomatic manner when giving instructions on a day-to-day basis. Describe some recent training situations in which you think you were somewhat too impatient with the learners. Ask for advice as to how you might have handled these situations more constructively.

2. Make an effort to apply the methods and suggestions you have picked up from your observations and discussions with this co-worker.

3. Continue meeting informally with this co-worker to get feedback on your skill in displaying patience and diplomacy during training or instructional sessions.

Criterion: When you begin to receive compliments on your patience and tactfulness from people whom you are assisting on the job, then you will have accomplished this goal.

To Increase the Self-Confidence of Employees

Reluctance to take on new tasks that will require employees to exercise more initiative and independent judgment than they are accustomed to may be due to a lack of self-confidence.

Over the next 3 months:

1. Assign tasks that contain a certain amount of challenge and that will require employees to stretch their capabilities in order to successfully complete them. However, the assignments should not be unrealistically difficult. Instead, they should be ones that employees will have a reasonable chance of success based on their skills and experience.

2. Encourage employees to make tentative decisions on their own even if the final decision-making responsibility rests with you. Their self-confidence will grow as they become better able to make tentative decisions that are in line with your own final decisions.

3. Offer praise when employees successfully complete subelements of the task.

4. Encourage employees to come to you for advice when they encounter difficulties. When a employee does seek advice, however, do not just state your recommendation and order them to carry it out. Ask for the employee's opinion. Sometimes simply talking about the problem will enable the employee to develop their own solution. In the process, you will also be building up their confidence in problem solving.

Criterion: As you master this suggestion, you will find that employees will turn to you less frequently for guidance.

To Increase Praise of Employees' Work Efforts

When you are trying to get someone to improve their performance--whether that means working harder, doing something differently, or doing something more often--praise and other rewards are going to be far more effective than criticism and other punishments.

1. Record all the times in which you praise and criticize employees' work over the next 2 weeks.
    a. Make an effort to keep complete records of your praises and criticisms; but do not attempt to do anything differently.
    b. At the end of this 2-week period, calculate the number of times you have praised and criticized each of your employees.

2. Make a concerted effort to steadily increase the ratio of praise to criticism during the next 3 months.
    a. Make a point of looking for instances of performance that meet or exceed your standards and then comment favorably on them.
    b. Remember to praise acceptable behavior as well as outstanding behavior since you want both types of behavior to continue.
    c. Couple criticism with liberal praise. Criticism by itself is not an effective motivator; however when preluded by praise for work in another area, criticism can be a powerful means of changing behavior.

3. Plot the ratio of the number of times you have praised your employees to the number of times you have criticized them at the beginning of each work week. Check to see if this line is steadily increasing over the duration of this 3-month period.

Criterion: When your ratio of praise to criticism is twice as great as it was during your first 2 weeks on this exercise, you will have succeeded in accomplishing this goal.

To Provide Prompt, Specific Feedback to Employees

The manager is responsible for conducting performance appraisal sessions with employees on a regular basis. However, these formal interviews should be supplemented by informal, day-to-day coaching and feedback. Prompt positive feedback may spur employees on to even better performance improvement.

Over the next 3 months:

1. Make an effort to provide more frequent feedback to employees.
2. Emphasize strengths rather than dwell on the negative aspects of employees' capabilities. Let employees know what you think they are doing well more often than you normally would.
3. Be willing to provide prompt negative feedback to employees if necessary rather than let them get by with poor performance for a period of time. However, be prepared to cite specific examples of day-to-day behavior that support your criticism, as well as offer specific suggestions as to how they can correct the performance problem.

Criterion: If you notice a gradual increase in either the quality or quantity of employees' work over the 3-month period because of the prompt, specific feedback you have provided them with, you will know that this has been a worthwhile activity.

To Provide Guidance to Employees

If the manager establishes an open, relaxed atmosphere where seeking and giving help are viewed as a normal part of everyday activities, employees are more likely to come to them for guidance when problems arise.

1. Make it clear to employees that requesting help is not a sign of personal weakness.
2. Encourage employees to come to you for advice when they encounter difficulties. When an employee does seek advice, however, do not just state your recommendation and order them to carry it out. Ask for the employee's opinion. Sometimes just talking about the problem will enable a employee to develop their own solution. In addition to developing the employee's problem solving ability and self-confidence, this technique can make for a better relationship between you and the employee.
3. Meet with employees on a regular basis to help them sort out priorities and determine if they are experiencing any problems.

Criterion: If you are successful in mastering this activity, there should be a noticeable improvement over the next 3 to 6 months in the quality of employees' work. Further, as employees gain confidence in their own problem solving abilities, they are likely to turn to you less frequently for guidance.

To Improve at Giving Assistance in General

In providing guidance and instruction to others, you are called upon to take on many roles--including those of teacher, diplomat, and friend.

1. Test out and further develop your capacity to fill these roles by asking a co-worker to be your monitor to observe, as much as is convenient, your performance while you are giving assistance to people.
   a. Pick a monitor who has a reputation for their skill in instructing and helping others.
   b. Ask your monitor to meet with you on a regular weekly or biweekly basis to give you feedback and to point out areas where you still need to improve.

2. Develop a list of features that you want your monitor to pay special attention to when observing and evaluating your assistance-giving. Consider including the following features:

   a. Being responsive and pleasant when questions are asked (for example, smiling and responding promptly).

   b. Encouraging the learner to admit confusion. Never making fun of a question.

   c. Asking questions on important points to make sure the learner understands.

   d. Emphasizing difficult or key points by slower explanations or by repetition.

   e. Explaining why a procedure is done, as well as how.

   f. Providing the opportunity, when appropriate, for the learner to practice or actually perform a procedure while you are there. (Actual practice gives a much better explanation than words alone.)

   g. Checking back periodically after you have explained something to see how the learner is progressing.

   h. Adjusting the level of assistance that you give according to the learner's demonstrated ability.

   i. Building the learner's self-confidence by allowing them to master one task at a time--by presenting a new task only after the previous one has been learned. (It is discouraging to be confronted with many new tasks all at one time.)

   j. Being realistic in your expectations of the learner. Realizing that some experience/practice is required before top-notch performance can be expected.

   k. Giving constructive suggestions along with any criticisms. Also, trying to preface criticism with praise for some other aspect of the learner's performance.

3. At the end of the first week, sit down with your monitor to review what has happened. See if they can provide further counsel about your training style. Ask them to work with you in this manner several times over the next few months until both you and your appointed monitor are satisfied with the fashion in which you take on the roles required to provide proper training support to new learners.

4. At each of your regular meetings with your monitor, review all their observations and then identify the two features that you most need to improve in order to increase your overall effectiveness in providing guidance and instruction.

Criterion: When your monitor judges your performance to be fully satisfactory, sees no features as needing improvement, then you will have accomplished this goal.

To Capitalize on Strong Negotiating Skills

Employ your strength at cooperating and negotiating with others by providing support and counsel to a member of a project that you are directing who is having difficulty in this area.

1. Prior to meeting with this individual, prepare a development plan as to how they could more effectively work with others. For instance, it might be feasible for you to have them begin by observing the behaviors of team members during the next project evaluation meeting. Ask them to observe closely the behaviors of each group member. Then meet with them at the conclusion of the meeting to discuss how the group used conflict effectively in order to achieve its goals, or, conversely, how the ineffective use of conflict served as a stumbling block toward achievement of its goals. You might then ask them to chair one of these meetings so that they are given the opportunity to try to effectively deal with conflict among others.

Criterion: If you are successful in this project, you should see the individual gradually gain increased respect from fellow team members. The number of conflicts that they are involved in should diminish. Hopefully, this tutorial experience will also increase your understanding as to how successful negotiations and effective cooperation are brought about.

To Improve Skill at Providing Constructive Criticism

It is impossible to most effectively utilize the talents of others unless they are also motivated to do their best for you. One important step toward establishing this kind of atmosphere is to develop your skill at offering constructive criticism.

To help you become more attuned to the fine line between just being critical and offering constructive criticism, ask your manager to work with you in three role-playing situations.

1. Have your manager choose some aspect of your recent work that they feel is in need of improvement. Then have them approach you and criticize your work in a very abrupt, abrasive, and heavy-handed manner. React as you would normally react to such a tirade.
   a. After this session, jot down some adjectives describing the way you were feeling during the session (e.g., angry, hurt, hostile, not understood). Then write out how you think your work would be affected by such an exchange if this were a real work encounter.
2. The next day, repeat the session with your manager criticizing as constructively as possible. Again, react as you would normally. Consider how this approach differs from the approach of the previous day.
   a. After this session, sit down and write the ways in which the constructive approach differed from the abrasive approach, adjectives describing the way you were feeling during the session, and a sentence or two describing how you think your work would be affected after such an exchange.
3. Meet with your manager to review your notes and to discuss how they practice the art of constructive criticism in day-to-day work situations. Then, relate to your manager the actual on-the-job incident in the recent past in which emotions were highest when you spoke to someone else about their work performance. Try to recall such things as how the situation came to your attention, what you did as soon as you became aware of it, how you approached the individual, what you said and what was said to you, and the eventual outcome of the exchange. Discuss how you think the individual was feeling during the encounter and how you might have more effectively dealt with them to have the kind of impact you wanted to have on their subsequent work performance.
4. Role play this situation (with your manager taking the role of the other employee and you playing yourself). Ask your manager to interrupt this role play whenever they have a suggestion as to how you might better handle the situation.
5. With your manager, develop a list of points to remember in delivering constructive criticism.

Criterion: After you successfully complete this exercise, others will be more receptive to your constructive criticism and more highly motivated to do their best work for you.

To Institute Job Rotation

Job rotation can be an excellent means of broadening the general knowledge of employees. The experience should help employees expand their knowledge of the corporation. They should also be able to pick up some added job skills in the process.

Over the next 2 months:

1. Select at least one employee to participate in job rotation.

2. Meet with the employee and any other individuals who would be involved.

3. Determine the nature and limitations of the responsibilities the employee is to assume during job rotation.

4. Determine when they are to begin, as well as the projected length of involvement.

   a. Ensure that the timing is right. Job rotation should not be done at a time when it will interfere unduly with the work flow of the organization.

5. Determine who they will report to during this interval.

6. Determine what type of feedback you will require from the employee during job rotation.

7. Determine who will assume responsibility for the employee's present job duties during this interval.

8. Conduct a formal review with the employee once they return to their present job duties.

Criterion: If job rotation has been successful, this should be evident in the remarks the employee makes during the final review. They should show evidence of having broadened their knowledge of the organization and, in addition, should have picked up at least two new job skills.

To Broaden Employees' Exposure to Other Personnel Within the Organization

If employees are provided with opportunities to work with other people in the organization, they will be able to profit from the work-related expertise of such individuals.

Over the next 6-month period:

1. Elicit at least two suggestions from each of your employees as to how they could increase contact with other individuals in the organization. Suggestions could include:

   a. Participation in an interorganizational task force

   b. Job rotation

   c. Assuming responsibility for necessary negotiations with another organization

   d. Becoming the official liaison contact with another organization

   e. Spending a few days observing the work of another unit

2. For each selected suggestion, determine:

   a. The amount of time the employee should devote to this activity.

   b. What type of feedback you require from them

Criterion: When employees have successfully completed at least two such activities, you will have met the requirements of this exercise.

To Prepare a Selected Employee as an Understudy

By training a selected individual to assume responsibility for some of your various job tasks, they will be able to ensure the smooth flow of work within the organization during your absence.

1. Discuss with your manager the possibility of training an employee to become your understudy. Your manager may also want to provide some input into which employee is selected.

2. Meet with the selected individual to develop a training program through which they will gradually become capable of performing several selected duties that are normally within your sole domain.

3. Determine amount of time to be spent on this training program per month.

4. Determine the type of control you wish to maintain over their activities in this area.

5. Determine the limitations under which they will be operating.

Criterion: Once the selected individual is capable of performing at least five selected activities for which you normally would assume full responsibility, the requirements of this exercise will have been met.

To Develop Employees' Ability to Serve as Your Representative

By developing employees' ability to serve as the manager's representative at meetings through direct job coaching efforts, the manager not only broadens their exposure to organizational activities but is left with more time to devote to their own managerial growth.

1. Allow employees to accompany you to meetings whenever possible over the next 3 months.
2. Discuss in each case why the meeting was called, what position you wish to present, and any politics that might be involved.
3. Review what happened during the meeting. Cover any unexpected events and discuss any discrepancies between what occurred in the meeting and the information you gave the employee beforehand.
4. Allow an employee to serve as your representative at a meeting after having accompanied you to several meetings.
5. Be very specific as to the areas in which they have the authority to act on your behalf and in which areas they must refer decisions to you.
6. Ask the employee to tape the meeting if this is possible; an alternative would be to have someone take detailed notes of what happens during the meeting.
7. Meet with the employee at the conclusion of the meeting to discuss what took place.
8. Continue to provide coaching as needed prior to each subsequent meeting where they serve as your representative.

Criterion: If you are successful in mastering this activity, you will find that premeeting coaching from you will become less and less necessary as time goes on.

To Develop More Effective Recommendations for Training Programs

Given the amount of experience you have had in this job, you are in a good position to offer recommendations as to the kind of training that ought to be given to new personnel in your organization. To develop ideas for these suggestions, you might consider following one or both of the approaches listed below.

1. Prepare an outline with each of your job activities as a major heading.
   a. Under each heading, list the specific skills and knowledge that you believe contribute to effective performance.
   b. Put an asterisk in front of any skills and knowledge that you felt you were lacking when you were first hired for your job.
   c. At the end of your outline, list all the skills and knowledge that have asterisks in front of them.
   d. Take this outline to your manager and discuss the feasibility of providing appropriate training to new personnel in your organization, so they will not have to face the same initial deficiencies that you did.
2. In your contact with customers, internal and external, keep track of all of the questions and requests you receive.
   a. Identify those questions that recur regularly. Ask yourself whether you would have been able to answer each of those questions when you were first hired into this job.
   b. Write a list of all the recurring questions and requests that you would not have been able to answer fully at that time.

c. Take this list to your manager and discuss the feasibility of having a training course designed and offered that would equip new personnel to handle these questions and requests.

Criterion: When you have offered at least one training recommendation that your manager believes to be worthwhile you will have accomplished this task.

To Gear Training Programs to Employees' Needs

In determining the training and development needs of employees, the manager needs to rely on knowledge gained through regular observations of their job performance. However, while the manager may feel that they have an accurate picture of the training needs of employees, encouraging them to talk about their own interests and aspirations can help the manager better gear training programs to their individual needs.

Over the next several months:

1. Have informal chats with your employees where you encourage them to talk about their interests and aspirations.
2. Rely on information you obtain from regular observations of employees' activities as well as objective indices of job performance in determining training needs. However, also take into account the interests and aspirations of each employee as expressed to you during your informal discussions.
3. Decide if the training can best be accomplished on the job or through a more formal course or seminar. In making this decision, take into account the personality of the employee with whom you are dealing. Some employees may profit most from formal classroom type instructions; others may learn best when given personal attention in an on-the-job training situation.

After choosing a training activity:

1. Explain to the employees why the particular activity was chosen and what you think they will get out of it. Point out to the individual the various factors you tried to take into account in deciding on this particular activity, including the information you gained during your informal discussions with them.
2. Encourage input from the employees on the appropriateness of the training activity.
3. Determine jointly how the training will be applied to specific on-the-job situations.

Criterion: If follow-up with employees 3 to 6 months after the completion of a training activity indicates that they are still utilizing knowledge gained from the training activity, this will be your measure of success in choosing training activities that are geared to their needs.

To Plan Ahead for Training Activities

When the manager decides to send an employee to a formal training program, the employee should be informed as far in advance as possible so that they have time to prepare for being absent from the job.

Each time you decide to send an employee to a training program over the next 6 months:

1. Let the employee know of your decision well in advance so that they will have time to prepare for being absent from the job and will not worry about what is happening during their absence.
2. Assist the employee if necessary in rearranging activities with their area and establishing priorities for tasks that have to be accomplished. In this way, work that has to get done can get done despite their absence from the job.

3. Decide jointly to whom their employees should turn for assistance during their absence.

Criterion: If you have been successful in preparing employees for their absence from the job, you should note over the 6-month period that employees are gradually becoming less apprehensive about being sent to training programs. In addition, you should notice that activities within their area are flowing smoothly and that work is getting done despite their absence.

To Measure the Success of Training Programs

Training programs must be regularly evaluated by the manager to ensure that they are serving their purpose.

Each time you send an employee to a training course over the next 6 months:

1. Ask your employee to provide you with a written report within 2 or 3 days after completing the training course. The report should include specific ideas as to how the employee intends to apply the knowledge gained to their job. It should also include any negative reactions to the training program.
2. Ask for another report 1 or 2 months later on what the employee is actually doing differently as a result of the training program.
3. Do not rely solely on the employee's subjective self-reports about the training program. Knowing that the company has invested time and money by sending them to a formal training program, many employees may tend to speak about the program in generally favorable terms, whether this was the case or not.
4. Look for ways to compare the expected results of the training program with the actual results. For example, if the expected result was increased facility with a particular work procedure, is this result actually observable in terms of increased output and/or increased accuracy in performing the procedure? Even if the expected result is something less concrete, such as the increased ability to motivate others, it should nonetheless be observable. In such a case, look for opportunities to observe the employee's motivational skills in action to see if the expected result has, in fact, been obtained.

Criterion: If the observable results of a training program are in line with the results you expected when you sent an employee to the program, this will be an indication to you that the training program has served its purpose.

To Measure the Success of Training Programs via Follow-Up Report File

Training programs must be regularly evaluated by the manager to ensure that they are serving their purpose.

1. Begin a file of follow-up reports related to courses and seminars you and/or employees attend during the next 6 months. These reports should outline what was learned from the course or seminar and emphasize specific ways in which this knowledge was applied to actual on-the-job situations.
2. Review these files periodically to determine if specific training programs are serving their purpose.
3. Make a note of general trends that emerge. If you note that there are several negative comments over a period of time about a specific training program, or if there is no indication that significant changes have occurred in on-the-job performance as a result of the training program, you may seriously want to consider eliminating this particular activity from your training and development program.
4. Refer to your file of follow-up reports when you are investigating training possibilities for employees.

Criterion: If your file of follow-up reports is serving its purpose, training programs you choose for employees based on the information in these reports should be better geared to their on-the-job needs.

To Measure the Success of Training Programs Through Application of Knowledge Gained

Training programs must be regularly evaluated by the manager to ensure that they are serving their purpose.

The next three times you send an employee to a training program:

1. Meet with the employee within a week of the conclusion of the training program.

2. Jointly develop a plan by which the knowledge gained through the training program can be specifically applied to on-the-job situations.

3. Arrange for follow-up with the employee 6 months later to discuss how and to what extent they are still utilizing the knowledge gained through the training program.

Criterion: If follow-up with the employee indicates that they are still utilizing the knowledge gained, this will be an indication that the training program has served its purpose.

To Capitalize on Strong Training Skills

Because demands vary across situations, effective trainers in one situation may not be effective in another situation. If you have demonstrated effectiveness at the type of training required in your organization you are in an excellent position to help your co-workers develop the necessary situation-specific training skills.

1. Think of various ways that you can train your co-workers to improve their training skills. Consider the following examples and then develop your own training suggestions tailored to the specific situation and needs existing in your department.

    a. Circulate a memo to your co-workers indicating your willingness to have them sit in on training programs that you are conducting and/or listen in when you are giving technical instructions to others. Indicate, further, that you would certainly be willing to take time after any such sessions to explain your approach to the situation and to answer any questions they might have.

    b. Tell your manager that you are willing to work with fellow employees who are designing training programs for the first time. Working with your manager, set up a system whereby you are informed every time a co-worker is given a new training program to develop. Then you may contact these co-workers promptly with your offer of assistance.

    c. Suggest to your manager that you are willing to observe, give feedback to, and generally provide guidance to fellow employees who are experiencing difficulty in explaining technical procedures or who are dissatisfied with their effectiveness in conducting training programs. If your manager agrees, circulate a memo to this effect to your co-workers. If any co-worker indicates a desire for your assistance, meet with both that co-worker and your manager to negotiate the specific details.

2. Write a brief summary outline of the training suggestion(s) that you are willing to implement.

    a. Discuss this outline with your manager to get their approval and to work out the details of implementation.

    b. Develop a concrete plan to follow in implementing your suggestion(s).

3. Follow your plan for offering training in training to your co-workers.

    a. Meet periodically with your manager to discuss any problems you might be encountering and to plan any changes you think desirable.

Criterion: When you have conducted some training in training with one or more of your co-workers and believe it has been effective in improving their training skills, then you will have been successful in capitalizing upon your own strong training skills.

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To Coordinate Activities on a Project

Encourage cooperation, not competition, when assigning a project by posting an overview of the project in a conspicuous place

1. Place the names of assigned individuals next to the tasks involved and include deadlines and interim checkpoints.
2. Supplement this with a progress chart so that individuals involved gain a sense of how their activities affect the team.

Criterion: When you have accomplished this task for four projects, you will have completed this suggestion.

To Identify the Resources Necessary for Good Coordination

Most company activities require the input and cooperation of a number of people and resources. Bringing people and resources together in a meaningful way is the backbone of coordination.

1. Whenever you are confronted with a task, prepare a list of resources and activities that are necessary for its completion. Use this as a checklist to ensure significant functions and materials will be available. Develop alternate coordination plans so that you can choose the one most suited to the problem.

Criterion: When you have identified the resources for four tasks requiring coordination and those resources have proved adequate, you will have completed this suggestion.

To Improve Skill in Identifying Personnel Resources

All people have strengths and weaknesses. When you are choosing the people to work with you on a project, or even just asking one or two people to assist you in achieving a work goal, it is most desirable to choose people whose strengths and weaknesses complement each other. Thus, one way to build upon your skill in coordinating people is to become more familiar with, and objective about, the strengths and weaknesses of people you are likely to be working with.

1. List the names of all the people in your and other units whom you are likely to be able to work with in the upcoming year. Work your way through the list, at the rate of two names per week, making note of what you would consider to be the person's major strengths and weaknesses in each of these three general areas: technical/professional, interpersonal, and personal characteristics. Every person will have a strong point and a weak point in every area, even though neither of these points may be so particularly strong or weak that they would stand out to the casual observer.
2. After one month, meet with your manager to discuss the appraisals that you have completed at that time. Ask whether his or her evaluation corresponds to yours. Discuss any discrepancies and try to reach consensus. Also discuss your reactions to this assignment. Do you now feel more able to choose a well-balanced work team?
3. Continue to work through your list of co-workers and meet periodically with your manager to discuss your appraisals.

Criterion: When you are confident that you know who you can turn to when you need any particular kind of assistance, you will have accomplished this goal.

To Improve Your Coordination Capabilities Through Increased Knowledge

Often, expanding your knowledge and expertise will improve your coordination functions.

1. Communicate regularly with people both inside and outside the company who are involved in work similar to yours or whose research affects your field of expertise.
2. Keep up-to-date in your reading of company publications and technical journals that relate to your job area.
3. When solving a problem, avoid spending long periods of time and energy on problems that have already been solved by someone else.

Criterion: You will have accomplished this suggestion when expanded knowledge has significantly improved your ability to coordinate.

To Improve Group Leadership Skills by Understanding the Group Process

Cooperative effort in groups is essential, particularly when each group member knows only one branch of the subject that is being discussed. The leader must provide a coordinating function to ensure a free exchange of ideas and accomplishments of the group's goals.

Each time you serve in a group leadership capacity over the next few months:

1. Determine the objectives of each group member before the meeting begins.
2. Concentrate on the group process rather than on outcomes.
3. Listen in order to understand rather than to pass judgment.
4. Take responsibility for accurate communications between members.
5. Be sensitive to unexpressed feelings and protect minority points of view.
6. Keep the discussion moving.
7. Summarize key points at the conclusion of the meeting.

Criterion: Completion of this activity should result in the routine utilization of these suggestions.

To Increase Awareness of Other Organizations' Resources Through Investigation and Interaction

Effective cooperation with other organizations within the organization presupposes a knowledge of their activities and the resources each has to offer.

Over the next few months:

1. Find time to visit organizations with which you would ordinarily have limited contact.
2. Learn about their personnel and the kinds of activities and projects in which they are involved.
3. Determine if there are ways in which the human resources of your own organization might be combined with those of another organization on a special project.

Criterion: Completion of this activity should result in your periodically visiting unfamiliar organizations.

To Become More Familiar With the Work of Other Units

When you have a clear idea about the types of projects that people in other organizational units are working on, you will have a better idea as to where you might be of assistance and will find it easier to volunteer your service to help the other units achieve their goals. Since this tends to be the type of information that is not written down in one central place, you will have to prepare your own list.

1. Meet with your manager to get a list of all the other work units that they might be willing to have you work with on a voluntary basis during lull periods in your unit.
2. Over the next month, contact people in each of those units to find out what types of projects they are working on.
3. Ask each of the persons that you contact to think of the projects that they have worked on over the past 6 months and to suggest ways that you might have been able to assist them on these projects.
    a. This should give you a more specific idea of how you might help this unit in the future.
4. Organize all this information into an outline with unit names as headings and types of projects as subheadings. Under each subheading, list the skills, knowledges, and abilities that you have which might be useful.
5. Show your outline to your manager. Discuss what you have learned about how you might be able to assist neighboring work units in the achievement of the goals.
6. Ask for your manager's suggestions as to which units you might consider volunteering your services to in the near future.

7. Consider also meeting with your co-workers to show them your outline and to share with them the knowledge that you have gained as to how people in your unit might be of valuable service to people in other work units.

Criterion: When you have completed this process you should have a clear idea as to how you can most usefully apply your skills during the next lull period in your work unit; you will then have accomplished this goal.

To Develop Interorganizational Coordinating Skills by Increasing Interaction

The employee high on the coordinating factor is able to view their own organizational unit as only one part of an interrelated system. They recognize the importance of cooperating with other organizations in order to make the best use of organizational resources.

Within the next few months:

1. Seek out a team project assignment working with individuals outside of your area of expertise. This will provide you with an opportunity to interact with diverse individuals and to pool collective knowledge.

2. Do not hesitate to call other organizational units by phone and ask specifically for the person who can give you an answer on a question you have.

3. Try to set up interorganizational meetings to "cross-fertilize" knowledge among organizations.

4. When employees from other organizations request assistance with problems in your area, take the time to thoroughly and accurately respond.

5. Avail yourself fully of the services offered by other organizations.

6. Identify yourself with organizational goals and objectives. Determine where your expertise fits in and how it may be used more effectively. Discuss your ideas with others to identify new opportunities for more efficient use of your own resources.

Criterion: Completion of this activity should result in greater awareness and utilization of organization resources.

To Reduce Uncertainty About What is Expected in New Assignments

You may have difficulties in working with persons from other units because lines of authority and areas of responsibility are not clear. You will be more enthusiastic and comfortable working in these inter-unit groups, and thus more productive, if you can reduce the amount of ambiguity.

The next time you are assigned to work on a project team with individuals from other organizational units, try the following steps.

1. Ask your manager to tell you who is leading the project team; who specifically you will be reporting to; how much time you are expected to spend working on that project as opposed to your regular work; how long you will be working on that project; and, finally, as much as he or she knows about what you are expected to accomplish while working as part of the project team. Determine and inform your manager of the impact on your regular work. Write a brief summary of this information.

2. In your first meeting with the project leader, ask the same questions but probe for more specifics concerning your duties and responsibilities. Find out exactly what you are expected to accomplish, what the deadlines are, what assistance will be available to you, and who you should be helping out. Write a brief summary of this information. Think of this as a role description for your part in the team project. Check to see whether this role description corresponds to the information you received earlier from your manager; clarify any discrepancies.

3. Send a copy of your written summary to your project leader and your manager. Attach a memo indicating that this summary represents your understanding of your role in the team project and asking them to correct any misconceptions. Also point out any ambiguities still present in your mind and ask for further clarification. (Be sure to explain to the project leader that you prefer to have your work quite highly structured, that this attempt at clarification is no reflection upon their leadership skills, and that you would appreciate their help.)

4. When you have received replies to your memos you should be very certain about what is expected of you. If you are not, meet privately with your manager and project leader to clear up any confusion.

5. During the course of the project, meet with the project leader whenever you begin to feel unsure about what you should be doing or who you should be working with. If, for any reason, you cannot meet immediately to clear up these emerging uncertainties, write a memo instead. Describe the area of your uncertainty and specify the assumptions which you will be acting upon until you hear differently. (Again, be sure to convey to the project leader that this is no reflection upon their leadership skills.)

6. Also during the course of the project, periodically meet with your project leader and manager asking how well you are doing in meeting their expectations. Ask for specific feedback concerning your performance on the project.

7. At the end of the project, meet with your manager to discuss your thoughts about work on the project and their impressions about your participation. By following these steps you should find that you have worked more harmoniously, comfortably, and productively as a team member.

8. On the basis of this evaluation, complete a new, personalized set of guidelines to follow the next time you become involved in an interunit project. This set of guidelines should be similar to the one outlined here but more tailored to your individual situation and needs.

Criterion: Once you complete such a process and find that you have been correct in your understanding of all major expectations, you will have accomplished this goal.

To Help Set Up Project Control Centers

Project control centers display all data and information relevant to a project and its progress in one concentrated area. Involved employees are able to use this center to fit their participation into an overall picture of the entire project.

1. Prepare a simple blueprint of a project control center the next time you assume responsibility for the technical direction of a project. The form the center should take will, of course, depend upon the complexity of the project. It might simply consist of a small wall display. Alternatively, the scope of the project might condone allocating an entire room to the center. In either case, however, the center should optimally be located in a place where meetings can be held so that team members will have ready access to pertinent facts during group discussions.

2. Obtain all needed materials. Wall display panels for charts and graphs, tackboards for temporary displays, blackboards, and audiovisual equipment are some of the more common materials used to display information in such centers.

3. Make arrangements for it to be set up as soon as possible.

4. Set up such centers for each project you assume responsibility for over the next 4 months.

Criterion: As you become successful in setting up effective and worthwhile centers, you will notice an increase in the extent to which employees refer to and use them.

To Improve Distribution of Project-Relevant Information

Leading a team project requires coordinating the efforts of other employees. Distributing the appropriate information to each team member is an important facet of coordination.

1. Make up an assignment chart each time you begin a project. It should include the names of each of the project members and the jobs they have been assigned.

   a. Across from each job, make a list of the information relating to it.

   b. If the same information must be conveyed to several individuals, consider presenting it at a time when they are all present. This will cut down on the time element and will also guard against leaving out material during constant repetitions

2. As the project proceeds, seek feedback from all members of the team regarding the completeness of the information you have given to them. Ask them if they feel any further data is required to ensure that their tasks are performed completely and accurately.

3. Over the next 2 months, keep a running list of instances in which you failed to distribute necessary information to individuals involved in a project.

   a. Write down what you failed to convey and its consequences in terms of work which had to be redone, the quality of the completed assignment, etc.

   b. Each time you begin another project and are preparing the assignment chart, review this list to ensure errors are not repeated.

Criterion: When you have confidence that you can lead projects without forgetting to convey the important task-relevant information to the project members, you will have accomplished this goal.

To Improve Coordination of Information for Project Members

In coordinating the work efforts of several individuals towards a particular work goal, you may be responsible for providing the information they will need to effectively complete their portion of the work. In order to avoid delays in the work of yourself and others, it is essential that you have this information on hand when it is needed.

Each time you undertake coordination of a project, follow these steps.

1. Establish what the project members need to know. Make a list of all the information required for the project. If the work is to be completed in stages, a timetable should be set up with deadlines for obtaining the information necessary for each stage.

2. Prepare one or more folders for the project that will eventually contain all the material that project members may need to refer to. The number of folders you need will depend on the size of the project. When you have more than one folder of project-related material, be sure to clearly index their contents.

3. Each time you obtain a particular item of information, check it off the list. Then, take the time to organize the incoming information and incorporate it with the material you already have on hand.

4. Encourage the members of your project team to inform you whenever they need some information that is not included in your folders.

Criterion: When you have coordinated several projects without having any project members inform you, or complain about, the absence of necessary information, you will have accomplished this goal.

To Improve Delegation of Work

In assigning and distributing the work involved in a project, you must be aware of the amount and nature of the work you are assigning to each individual as well as the degree of guidance they will require to complete the task.

1. When you have a chance to serve as project leader coordinator, take more care in the manner in which you distribute work.

2. Review the project to determine how the work could most easily be divided.

3. List the different tasks in the order of their difficulty. Then, try to predict the amount of time each would require to complete.

4. List the names of each of the individuals involved in the project and begin to break up the work. In doing so, take the following items into consideration:

   a. The various levels of expertise the individuals have. It might be appropriate to assign more difficult tasks to individuals who have had more experience and/or better skills in that area.

   b. The acquired work pace of each individual involved. If you simply allot equal portions of work to each person involved, differences in the speed with which they can handle the work will make for unequal work loads.

   c. The attractiveness of the assignments. Be careful that you do not make it a practice to single out one person to perform all the unpleasant jobs, even though they may be the most efficient at handling them. Alternate dull tasks with more challenging work.

5. In assigning work to others, try to generate a comfortable atmosphere so that they will not hesitate to ask you questions.

   a. After explaining the task, try asking a few questions to make sure that you have gotten your message across. However, try to avoid making it sound like an interrogation.

6. At the end of each project, initiate a discussion with the individuals to whom you assigned work. This can be done either on a group or an individual basis, depending upon your preference.

   a. Seek feedback from them as to the manner in which you distributed the work. You might ask, for example: whether the work could have been broken down more effectively; whether anyone was dissatisfied with the work they received; whether anyone felt their special skills were not used most efficiently; and so forth.

   b. Incorporate their comments as a further consideration to be taken into account when assigning work in the future.

Criterion: When you are able to assign tasks to individuals without changing these assignments as the project progresses (and still meet your deadlines), you will have accomplished this goal.

To Improve Quality of Walk-Throughs or Review Meetings

In order to ensure the understanding, support, and effective action of team members, it is important that you hold walk-throughs or review meetings with them. However, simply holding the meetings is not sufficient. The meetings should be action oriented, direct and to the point, and serve to build up a strong team spirit and personal commitment by every team member. To ensure that these goals are met, follow this sequence every time you schedule a meeting over the next 2 months.

1. Prepare a written agenda. Attach a request that each member be prepared to provide all data from their area of assignment relevant to each agenda item.

2. Distribute copies of the agenda to the participants at least 1 day in advance.

3. Improve your effectiveness as a group leader by observing the following points.

   a. Avoid dominating the discussion. Move out of the limelight and act instead as a catalyst for the free exchange of information.

   b. Encourage the generation of new ideas by avoiding any curt dismissals to tentative proposals. Try to offer support to and build up on others' suggestions.

   c. Be open to any disagreement with and/or criticism of your project management by being tolerant of opposing viewpoints.

4. Meet each problem that arises during the meeting with an action assignment. If the project is encountering scheduling, budget, and/or technical difficulties, determine in a general manner how these are to be solved. Assign responsibility for action required and determine who will contribute to this action. Set a date as to when the action is scheduled for completion.

5. Summarize all major areas covered and decisions made at the meeting's conclusion.

6. Distribute written action assignments within 24 hours of the meeting to all team members with specific names of responsible employees and the due dates.

Criterion: As the quality of review meetings improves: meeting length should be cut down appreciably, the number of resulting action assignments will increase, and verbal participation of team members will increase.

To Capitalize on Effective Utilization of Human Resources

Employ your good skills at utilizing the talents of others to assist the entire work unit in more efficiently using its human resources.

1. Work up a proposal for creating a Human Resource Reference File cataloging the particular areas of expertise of all those (including those in other organizations) whose services or knowledge might be of help to projects in which your area is frequently engaged. This proposal should include at a minimum:
   a. A plan for surveying the available talent
   b. A method for organizing that information in a useful, convenient manner
   c. A procedure for accessing the information
   d. Some guidelines restricting its use
   e. A method for updating its contents
2. Review your proposal with your manager and make any necessary revisions.
3. Ensure that this file is operational within 2 months of the start of your involvement.

Criterion: The extent to which this Human Resources Reference File is referred to and used by employees in your unit will be the most valid indicator of its worth.

To Effectively Utilize the Talents of Team Members

In serving as the head of a team responsible for a given project, the assignments you make should take into consideration the special talents and expertise that each of the team members brings to the project. The appropriate use of available human resources will improve the quality of the project's final output.

1. Prepare a Human Resources Chart in a form convenient for reference purposes. The chart could include headings such as: name, shift, job title, expertise, special training, and projects interested in working on.
2. Fill in such a chart each time you assume responsibility for directing a project over the next 4 months. Meet with each of the team members to determine:
   a. Their particular areas of expertise
   b. Any special training they have received
   c. Past projects they have been involved in
   d. Their job-related interests and ambitions
3. Refer to this chart frequently while engaged in scheduling and delegating the functional tasks of a project. Also use it to delegate action assignments if and when crises are encountered.

Criterion: If you are successful in this exercise, an increasing number of the assignments you make will have a rationale behind them based on an awareness of the special talents and expertise of involved employees.

To Improve Coordination of Employee's Work With Others

Most company activities require the input and cooperation of a number of people. The work will be most useful if well integrated with the activities of others. This requires that someone be responsible for checking at various points in the process to ensure that activities are coordinated.

1. Work with the employee initially to develop an overall plan. Together, outline the subtasks to be completed and set deadlines for each subtask.
2. Give the employee responsibility for ensuring that the work is coordinated with that of co-workers. The employee should refer daily to the planned deadlines and notify other employees in advance that their input will be needed at a certain time to complete the project.
3. If scheduling conflicts arise during the course of their plans, the employee should refer to you to resolve this conflict and/or adjust their deadlines accordingly.

Criterion: A reassessment 2 months after implementing this suggestion should result in a significant decline in the number and severity of coordination problems.

To Improve Coordination Among Team Members

In order to ensure the optimal utilization of available resources, the efforts of team members must be effectively coordinated. Each employee should be kept informed as to how their particular assignment will relate to the work of other members.

1. The next time you assume responsibility for the technical direction of a project, prepare an action plan for each project phase. An action plan will list all interrelated tasks, who they have been assigned to, relevant dates, and relationship to other tasks.

2. Distribute this plan to all members involved each time you begin a particular phase of the project. Also, when problems are encountered and the efforts of several individuals must be developed to cope with them, accompany the action assignments with such a plan.

Criterion: Once the project is complete, meet with the team members to get their feedback as to the usefulness of accompanying assignments with such action plans. If the remarks in this session are for the most part positive, you may wish to make them a routine part of your coordinating efforts.

To Provide Prompt, Specific Feedback to Team Members Through Frequent, Open Discussion

The project leader is responsible for promptly relaying information about the results of the team members' behavior. Prompt positive feedback gives the team member information about how to keep their performance on target, and thus to better achieve their goals.

Over the next few months:

1. Make an effort to provide more frequent feedback to team members.

2. Include discussion of high and low points of performance and of specific behaviors that contribute to, or limit, full effectiveness and accomplishment.

3. Emphasize strengths rather than dwell on the negative aspects of their capabilities. Let them know what you think they are doing well more often than you normally would.

4. Be willing to provide prompt negative feedback to team members if necessary rather than let them get by with poor performance for a period of time. However, be prepared to cite specific examples of day-to-day behavior which support your criticism, as well as offer specific suggestions as to how they can correct the performance problem.

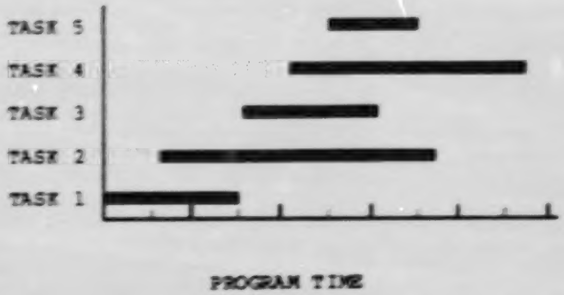
Criterion: Completion of this activity should result in increased quality and/or quantity in the work of others, due to your prompt, specific feedback.

To Improve Coordination With Other Units and Service Groups

You are responsible for the successful integration of your area of assignment into the goals of the organization of which it is a part. This is achieved through forward planning of subsequent stages and continued communications with other operating areas concerned with your assignment. In order to ensure that your efforts at coordination incorporate these two critical elements, follow this basic procedure the next time you head a project.

1. Prepare a breakdown of all functional tasks involved.

2. Draw a tentative Gantt chart in which tasks are listed along the X-axis and program time is distributed across the Y-axis, e.g.:



This chart will most likely be revised and altered. However, it will serve at this time to give you and those with whom you will be working a tentative timetable for project phases.

3. Prepare a project organization chart listing all individuals who will be involved in the project. Include the titles and names of all contacts within service organizations, design and tooling organizations, vendors, etc., with whom you will work.

4. Talk with each of these contacts in the very early stages of the project so that they will be fully informed in advance as to the timing and the type of input the project will require from their area. Use your preliminary Gantt chart and organization chart to give them an overview of the project. If one of the project's team members is to assume responsibility for all future liaisons with this contact, ensure that they are present at this introductory meeting.

5. Together prepare a list of all the technical information the area will require for successful coordination.

6. Together determine the dates on which such data should be delivered.

7. Together determine who within the team project should be contacted in the event of unexpected changes and/or problems.

8. Together schedule any necessary upcoming meetings.

Criterion: As your coordination with others improves, you will notice fewer and fewer instances in which your project objectives are blocked by a lack of appropriate input from the various units and service groups upon whom you rely.

To Avoid Rigidity in Coordination Functions

Recognize the need for compromise when working with others. Try to strike a balance between being rigid and unyielding and being unwilling to make decisions. Remain open to and actively solicit suggestions from others while maintaining decision-making responsibilities where it is appropriate. Co-workers will function most effectively in an atmosphere of a strong, but flexible, leadership.

Recognize that there is no one way to approach a task or problem. Tailor your solutions and methods to the particular factors that affect the situation.

1. List the constraints that apply to any coordination function. Some constraint areas are time, availability of resources, and skill of personnel.

Criterion: When you and your manager are satisfied that your coordination plans have the best response to a given situation, you will have mastered this suggestion.

To Overcome Difficulties in Work Relationships With Associates in Other Units

Difficulty in working harmoniously with people from other specializations may occur for a variety of reasons. For example, you may feel threatened by them and hence act in a defensive manner or you may feel superior to them and hence act in a superior manner. Or you might feel that you have nothing in common with them and hence act uncomfortable when working with them. Before you can achieve smoother working relationships with persons from other units, you must identify any reasons for disharmony.

1. Meet privately with one or more co-workers whom you trust. Discuss the problems you have had in working with persons from other organizational units. Explain that you need assistance in identifying the real reasons for your problems in this area. Then describe what you see as the major problems in your working relationships with these other individuals and find out whether your co-workers agree with your diagnosis. Continue the discussion until you have listed all plausible, major reasons for the current disharmony.

2. Meet with your manager. Show them your list of major reasons and explain how you arrived at this particular diagnosis and why you believe it to be correct. Explain that now, knowing the origins of the difficulties, you are going to draw up a step-by-step plan for overcoming them. Ask your manager for suggestions you might incorporate into your plan. Be sure to write down any comments.

3. Develop your step-by-step plan of corrective action. The exact nature of the plan will depend upon what you have identified as the reason underlying your difficulties in working with people from other organizations and your specific situations. Your first step might be to draw up a complete list of the assets that you bring to a project team.

4. Once you have developed your plan of corrective action, show it to your manager. Discuss any revisions that they think are appropriate. Then, while you are acting upon your plan, meet periodically with your manager to discuss your progress.

Criterion: When you can identify areas of possible conflict and plan to correct them before you begin a new project, you will have accomplished this goal.

To Improve Respect for Objectives and Constraints Under Which Other Groups and Service Units Are Operating

You are responsible for cooperating with others to accomplish optimal utilization of available resources. Successful cooperation, however, requires an initial respect for the constraints, structure, and objectives under which other units and service groups are operating. If such respect is not carried into the negotiations, conflicts are inevitable.

1. Over the next 3 months each time you encounter difficulties in negotiating with other units or service groups, follow this sequence.

   a. Ask the individual(s) to fully explain any constraints their unit is operating under which prohibits total acceptance of your requests. Stifle any impatience you may feel and counterarguments that come to mind. Instead, concentrate on listening to what they are saying. Then tell the individual you will consider the situation and get back to them.

   b. Put yourself in the other individual's place. Imagine you have taken on their responsibilities. Concentrate on understanding the pressures they are working under.

   c. Prepare one or two compromises under which the needs of both parties are taken into consideration if you feel that their objections are reasonable.

   d. Meet again with the individual involved to present your views.

2. Keep a journal of these situations over this 3-month period recording:

   a. The original objection to your request

   b. Your analysis of the appropriateness of this objection

   c. Any compromises you have prepared

   d. The final outcome

Criterion: As you acquire more respect for the objectives and constraints under which other groups are operating, the final outcomes recorded in the above journal will reflect an increasing number of successful negotiations.

To Develop the Ability to Motivate Others by Observing and Emulating Effective Motivational Strategies

To ensure the excellence of the project, it is essential that you apply motivational strategies that will cause team members to reach high standards in their work in terms of both quantity and quality.

1. Meet with your manager or a colleague who has a reputation as a good motivator of people. Discuss how they apply different motivational strategies to different kinds of people.

2. Work side by side with this individual during several appropriate situations to observe their motivational skills in action.

3. In the following month incorporate the ideas you picked up during the course of the day's activities into your own motivational efforts as often as possible.

4. Maintain a written record during this month of positive changes you observe in the behavior and/or work output of others.

Criterion: Completion of this activity should result in evidence of positive changes in the behavior and/or work output of others.

To Ensure Employee Performance Meets Project Standards

It is important that you take action when the performance of a particular team member consistently deviates from established project standards. Since it is a group effort, the failure of one individual to commit their efforts to the project will have potentially negative ramifications on all involved.

1. Over the next 3 months, each time you encounter weak performance on the part of a project member, institute the following approach.
    a. Pick an area of contention in which you are absolutely certain of your grounds.
    b. Point out the problem to the team member involved. Explain how you feel it is adversely affecting the project's progress.
    c. Request that they supply a plan for correcting the situation and arrange for a session in which this plan can be discussed by the two of you. By giving them the responsibility for developing a corrective action plan, you exhibit a trust in their ability to solve the problem.
    d. Once the proposed plan has been approved and put into action, closely observe the individual's performance in this area so that you can provide them with positive feedback on any evidence of improvement.

Criterion: As you improve in this area, you should notice an increasing number of instances in which you are able to effectively draw such individuals back into the group as productive team members.

To Improve Communication With Management Regarding Team Members' Performance

When you serve as the head of a team/unit you are responsible for providing regular inputs to management regarding the progress of individual team members.

1. Define milestone events (significant achievements) that must be met in the next project you direct.
2. Submit a written report to management each time one of these defined events is met. Begin with a brief summary of the status of the project, specifically stating the milestone event reached. Each of the team members input into accomplishing this event should then be outlined, specifically stating:
    a. Quality of their work to date. Extent to which work has been completed according to specifications and in conjunction with reliability and quality standards established by the company and the customer.
    b. Extent to which scheduled deadlines have been met.
    c. Extent to which expenses were effectively monitored.
    d. Problems that the individual encountered and the effectiveness of their chosen action plan.
3. Repeat this procedure for each project you assume responsibility for over the next 4 months.

Criterion: As your communication with management improves, there will be fewer and fewer instances in which you receive criticism regarding the extent of the information you provide.

To Improve the Ability to Coordinate Change Effectively

When a user has a special project that must take precedence over the regularly scheduled work, care must be taken to fit these changes into the work schedule most effectively. The employee who takes responsibility for so doing will minimize the disruption of the regular work flow.

1. Take the initiative to notify units whose work will be affected (delayed) ahead of time so that they will be able to adjust their schedules accordingly.
2. Consult with your manager if there is any question about priorities. Once the priorities are established, you will be able to automatically continue with the normal work flow after the unexpected project has been completed.

Criterion: Completing this suggestion should significantly reduce the negative impact of unexpected projects.

To Become Better at Giving Criticism Constructively

When you are responsible for reviewing the performance of other project members, you are bound to find some things that need to be revised or redone. At these times it is important that you practice the art of constructive criticism. Abrupt censure only makes for hard feelings and strained relationships.

1. Meet with a co-worker who has a reputation for tact and sensitivity in dealing with others.
   a. Find out how they practice the art of constructive criticism in day-to-day work situations.
   b. Describe some of the situations in which you have had to criticize someone; ask them to give you feedback on your approach and to suggest changes you might make in future situations of this nature.
2. Continue to meet with the co-worker periodically.
   a. Seek advice when you know you will have to criticize someone's work and you are not sure as to the best way to handle it.
   b. Discuss the reactions you have received when you have followed your co-worker's suggestions.

Criterion: When you feel more comfortable providing negative feedback to others, and find that they receive it more constructively, you will have accomplished this task.

To Capitalize on Strengths in Motivating Others

Capitalize on your strengths in motivating by seeking out opportunities where you will be required to motivate people who are unknown to you and in an unfamiliar setting.

1. Discuss with your manager such opportunities for involvement. This might include leadership of an interorganizational committee or task force.
2. Meet with your manager periodically to discuss how effective you have been in motivating group members to work together toward common objectives. If you have encountered some setbacks, discuss these with your manager and elicit their suggestions for alternative motivational strategies you could apply in your leadership of the group.

Criterion: Involvement in at least one activity of this nature over the next 2-month period will indicate completion of this activity.

To Further Improve Coordination Capabilities

You seem to function well in a coordination capacity. Capitalize upon your strength by seeking new areas of application for your skill.

1. Meet with your manager within the next week to determine how your experience in coordinating capacity could most effectively be employed.
2. Generate at least two new functions involving coordination for which you are to assume responsibility.
   a. Perhaps you could participate in the organization of a task force, chair an interorganizational team, or develop an organizational plan for some job function in your organization.
3. Determine with your manager:
   a. The exact nature of your required input
   b. When you are to begin as well as the projected length of involvement
   c. What type of feedback they require from you concerning your progress in this area

Criterion: When you have successfully completed the two selected functions, the requirements of this exercise will have been met.

To Utilize Your Manager to Help You Become a Better Coordinator

1. Have your manager present you with an objective. Describe what resources would be needed and how you would go about coordinating them. Discuss your performance with them and present a revised plan, if necessary.

2. Arrange for a series of these simulations over the next 3 months so that you may gain familiarity with problems of increasing complexity.

3. Ask for opportunities to participate in activities where you can orchestrate several functions.

Criterion: You will have accomplished these suggestions when you and your manager feel you have significantly improved your coordination functions.

To Capitalize on Strong Coordination Skills

Many people have difficulty being effective in the role of coordinator. Because you function well as a coordinator, you might consider offering yourself as a consultant to others in your unit.

1. Meet with your manager to express your willingness to assist others in their coordinating duties. If your manager is interested, work out some plan whereby you can do this. You might suggest for example that you be informed whenever some relatively inexperienced co-worker is given coordinating responsibilities. You could then go to that person and simply volunteer your services as a consultant. That is, you might offer to meet with the person over lunch in the upcoming weeks to discuss the problems they are facing and the strategies they are thinking of taking to overcome these problems. You might offer, also, to sit in on meetings that this person is holding with the new team members and then give feedback to the person on how they handled the meetings. There are, of course, many different services that you might render different persons to aid them in developing their coordination skills. This would be something you would have to "coordinate" with each individual.

2. After your first consulting role, meet with your manager and the co-worker whom you are assisting. Discuss the co-worker's reactions and feelings about your assistance. Develop with your manager a plan of action for making your consulting more effective in the future.

3. Continue to meet with your manager after each consulting job. If the two of you continue to believe that this form of consulting is valuable to others in the organization, you might wish to take it a step further by writing up guidelines for performance of such a task and proposing that someone in every neighboring organization should assume responsibility for this task. That is, you might assist other organizations in developing their own internal consultants.

Criterion: When you are satisfied that your strong coordinating skills have been transferred, at least partially, to others in your organization, you will have accomplished this goal.

PLANNING AND ORGANIZATION

A. WORK PLANNING

- Arranging for a time and place conducive to concentration required for planning
- Assessing needs and defining realistic goals
- Including sufficient detail
- Improving ability to give accurate time estimates and to schedule according to priorities
- Using backward planning techniques
- Modifying plans without losing sight of the original goal
- Recording assignments with a log-in system
- Providing appropriate evaluation vehicles in planning

B. LONG-RANGE PLANNING

- Increasing long-range perspective
- Anticipating and preparing for upcoming changes
- Including adequate evaluation criteria in planning
- Planning toward long-range organizational objectives from the organization's perspective

C. FINANCIAL PLANNING

- Providing accurate time and cost estimates/forecasts of current or proposed projects
- Communicating with management on expected deviations from current budget
- Controlling expenses within the budget

D. RESOURCE PLANNING

- Identifying data and materials needed for the job and ensuring that they are included in planning
- Organizing materials and keeping them in their proper locations to avoid delays in completing projects and assignments
- Assessing needs for materials and processing, and finding the most efficient and cost-effective sources of supply

E. VOLUME OF WORK

- Assessing employees' volume of work
- Increasing efficiency of work procedures and ensuring that time is distributed among activities according to priorities
- Coping with demands, pressures, and complexities of work
- Improving concentration and work skills

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To Accurately Assess Organizational Needs by Examining Categories of Need and the Available Resources

In planning, it is important to accurately assess organizational needs to ensure that there are no delays and that deadlines are met.

1. Ask yourself the following questions to aid you in the planning process when you are assigned a task:
   a. What kinds of personnel are needed to accomplish the task?
   b. What types of equipment will be needed?
   c. What other supplies will be needed?
   d. What informational materials will employees need?
2. Review this list with your manager or a colleague to determine how accurate you have been in assessing organizational needs in terms of this specific project.
3. Consult with your manager, colleagues, and others to ensure the availability of all necessary resources before finalizing your plan.
4. Discuss the impact your planning will have on other units or departments within the organization. For example, will the deadlines you set cause others to have difficulty meeting their own schedules? Or, if you are dependent on another unit or organization for supplies and resources, how much advance notice should they be given in order to provide you with the necessary materials in a timely fashion? In short, be sure to take all organizational and interorganizational factors into account in your planning.
5. Follow this procedure with each new assignment.

Criterion: If you are becoming better able to assess organizational needs during the planning stages of a project, you will notice a steady decrease in delays and missed deadlines over the next 3-month period.

To Ensure That the Goal or Problem is Clearly Defined

All too often it is tempting to rush ahead and begin problem solving before you have a clear picture of what it is you are trying to accomplish.

1. State the goal or problem in one or two short sentences. Be as specific as possible; if you are unable to do so, consider breaking the problem into smaller, more manageable goals.

Criterion: When you are able to state four consecutive goals in 10 words or less, you will have accomplished this suggestion.

To Avoid Losing Sight of the Original Goal

Sometimes it is difficult to keep the goal in mind. Often the complexity of a plan or operation requires so much attention to details that the larger issues get forgotten.

1. Over the next month, write down the goal and any subgoals in outline form.
   a. Make the outline detailed enough so that specific actions and tasks have a specified place in the planning.
2. If possible, post this outline where others who may be involved can refer to it often. In this way, it will serve as a reminder of the interrelation of tasks and activities.

Criterion: Following this suggestion should allow you to structure subgoals within a larger framework and clearly assess where in the process you stand at any particular moment.

To Eliminate Interruptions in Your Planning Time

Constant interruptions make it difficult to think clearly and plan well. Thus it is important for you to allot sufficient undisturbed time to accomplish your planning functions.

1. Set aside specific blocks of time during the day or week to devote to planning activities.
2. Communicate to others that this is planning time and that you do not wish to be disturbed by phone calls or other interruptions.
3. Keep to your schedule as much as possible.
4. If you are unable to avoid interruptions during your planning time, however, you might try escaping to a quiet place outside your area (i.e., conference room or library).

Criterion: When you are able to fully utilize three planning sessions without being interrupted, you will have accomplished this suggestion.

To Ensure That the Plan You Choose is the Best One Available

A plan is more likely to work well if it is the best one rather than the only one.

1. Choose two goals and generate at least three different plans, programs, or operations in order to meet those goals.
   a. Outline the strengths and weaknesses of each, comparing your perceptions with those of others who may be involved in the project.
   b. In making choices among them, be prepared to offer a rationale for your decision. The best rationale will be one that outlines specific strengths and weaknesses of the chosen plan in comparison to the alternatives.

Criterion: Following this suggestion will promote the use of better plans and provide options in the case of changing circumstances.

To Create An Organized Area of Work

An organized area of work will smooth the path for almost any task you perform. In this sense, it is the most fundamental of all planning efforts.

1. The employee is to institute the following steps over the next month:
   a. The desk surface and drawers are to be arranged to provide immediate access to supplies, writing utensils, forms, etc.
   b. Trays and folders are to be used to organize papers.
   c. Ten minutes per day is to be allotted for simply clearing off the materials on the desk.
   d. Specific information to which the employee repeatedly refers is to be written out and posted in a convenient place.
   e. A work manual that brings together information from various sources on the tasks routinely performed is to be prepared.
   f. A list of telephone numbers frequently called is to be drawn up.
2. A supervisor is to inspect the work area in one months' time. A 3- to 5-month inspection should also be carried out to ensure that the employee maintains an organized work area.

Criterion: If the employee's area of work is thoroughly organized, they should notice that the number of times they must search for materials is cut down at least by one half.

To Determine What Time of Day is Best for Planning

Some people function best early in the morning, while others do not reach their peak until somewhat later in the day.

1. Take personal factors into account by considering your internal clock. What time of day is best for clear thinking for you? Whenever possible, organize your day so that routine activities are relegated to low times.

Criterion: When you have determined your peak period in the day and have allowed at least one-half hour of planning time during this period, you will have accomplished this suggestion.

To Ensure Planning is Detailed Enough

When planning is the means for reaching a goal, it is important to determine whether the plan is detailed enough to be useful.

1. Use the following checklist as a guide for achieving relative completeness in planning.
   a. What personnel are needed to accomplish this task?
   b. What equipment will be needed, when?
   c. What other supplies are necessary?
   d. What information do you need to make informed decisions?
   e. What information and materials do employees need?
   f. What time frames are relevant to the task?
   g. What preparations can you make for anticipated problems?

2. Review this list with your manager to assess the accuracy and thoroughness of your planning.

Criterion: When your manager has approved two planning checklists that you have devised you will have completed this task.

To Include an Appropriate Amount of Detail in Plans and Proposals

It is important not to become immersed in minor details in preparing plans and proposals, since others may have difficulty grasping the key points you are presenting. However, a certain amount of detail is necessary to make the plan or proposal complete.

The next time you prepare a plan or proposal:

1. Determine the required level of detail by deciding who will read your report and for what purpose. Then, prepare a list of details on which you really need to focus.
2. Review this list with your manager or a colleague to see if you have neglected any important details or, conversely, if you have gone into more detail than is really necessary.
3. Give most attention to the important details and relatively little to others in preparing your plan or proposal.
4. Double check the final product to see if in your mind's eye you have provided the right amount of detail.
5. Check the final product again with your manager or colleague to see if they agree that you have provided the appropriate amount of detail.

Criterion: When you are able to independently complete two consecutive plans or proposals without receiving feedback from your manager and/or colleagues related to over attention or under attention to detail, you will have mastered this suggestion.

To Improve Appropriateness of Scheduled Priorities

It is important that the assignment of priorities to various job tasks is consistent with organizational needs.

At the beginning of the next work week:

1. Prepare a brief list of all the tasks you have on your agenda for the week. Rank these according to the order in which you intend to tackle them.
2. Present these to your manager so that they can make any necessary changes so the order reflects organizational priorities.
3. Explain your own rationale for ordering things the way you did, and make sure you completely understand the basis for your managers decisions, that is pay careful attention to the factors that make one assignment more urgent than another.

Criterion: As your understanding of organizational needs increases, there will be fewer revisions made to your ordered list of scheduled activities. Keep the exercise going until two successive weekly listings are accepted without revision.

To Improve Work Preparation

If you find yourself frequently being forced to interrupt your work on projects to seek out further information, you could save yourself time by planning your work so that you can proceed in a more coherent fashion. Specifically, by making an initial appraisal of required information and then obtaining it before you begin the actual work on a project, you can conduct your work more efficiently.

1. Develop lists of the sources of information available to you so that you can readily track down any information you might need for future projects.
   a. Prepare a Who's Who list of the personnel within your organization and those organizations with which you have close connections. Include a brief description of each person's major scope of responsibility, perhaps including a partial list of the products and services they have worked with in the past and their particular areas of expertise.
   b. Prepare a list of available reference material. The list should include all the manuals, documentation indices, books, files, etc., you have access to.
   c. Review these two lists with your manager and other co-workers for further suggestions. Revise your lists accordingly.
   d. Post these lists in an easily accessible place near your desk.

2. Each time you receive a project assignment, carefully review the work to determine whether it requires tracking down information.

   a. If so, use your lists to classify required information according to the appropriate reference source. In this manner, you will have to resort to that source only once. Interruptions of other personnel will be kept to a minimum and you will have the material at hand once you begin a task.

   b. Each time you interrupt your work on a project to seek additional information, ask yourself whether this information-need could have been anticipated and filled before you began work on the project.

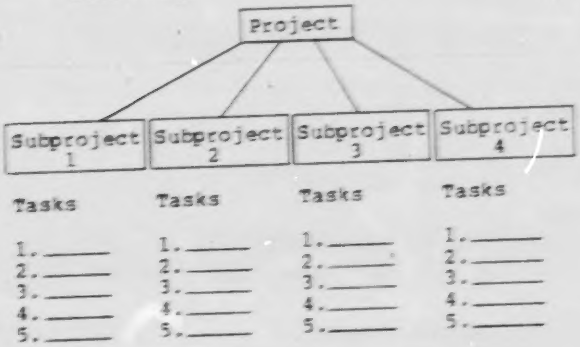
   c. Keep a record of the number of times you interrupt your flow of work on a project to seek additional information that you believe you could have anticipated the need for.

Criterion: When you have completed work on three consecutive projects without making any interruptions to seek information that you could have initially anticipated, then you will have accomplished this goal.

To Improve Ability to Prepare a Project Breakdown Structure

When planning for an assignment that is complex and covers a fairly wide scope of activities, it is of great value to begin by preparing some type of a breakdown structure. In this fashion, an unwieldy assignment can be transposed to a number of easily handled tasks.

1. Over the next 4 months, each time you assume responsibility for such as assignment, prepare a breakdown structure in graphic form such as the following.



2. Under each subproject, list the tasks according to the order in which they must be completed.

3. Use this task breakdown as a basis for developing a project plan--for assigning expected completion dates to each of the tasks, estimating time requirements, anticipating support needs, and so forth. If your manager or project leader has not established forms to be used for this purpose, draw up your own.

Criterion: If you are improving in your ability to break down complex assignments into workable parts, you will find that your project plans are easier to develop, more precise, and more realistic.

To Improve Implementation of a Sales Account Strategy Plan (SASP)

While an account strategy plan represents a concrete description of sales goals to be accomplished, the means to achieve those goals is subject to the discretion of the individual. Good planning increases the likelihood of meeting SASP objectives in an efficient and productive manner.

1. Review the SASP as a whole to obtain an overview and determine interconnections between items.

2. Some items will likely be relatively straightforward, while others will require more detailed planning in order to meet the objectives. Determine which items might best be subdivided into smaller component goals and list these preliminary objectives.

3. For two of the relatively complex objectives contained in the SASP, write out a detailed plan to accomplish the objectives. Be sure to include dates, actions, equipment, personnel, etc., needed to achieve the goal. Initially choose objectives that can be accomplished in a relatively short amount of time. As you gain familiarity with the procedure, goals of greater magnitude can be subject to this scrutiny.

4. If possible, review the plan(s) with your manager to obtain their suggestions for revision.

5. Keep a record of actions actually carried out and compare these to the original plan. When the objective has been reached, review the plan to determine what changes might have occurred that would improve the quality of initial planning in the future.

6. Analyze the amount of time you spend sweeping the territory versus selling to specific customers versus installing versus protecting. Using a selling year as a timeframe, determine ideally when these activities should best be implemented. Decide the proportion of time which should be allotted to each activity for each month of the year.

Criterion: Implementing this suggestion will result in greater clarity and efficiency in carrying out the SASP goals.

To Ensure Plans That Require the Assistance of Others Are Possible to Carry Out

When your planning requires the assistance of others or has impact on others, enlisting their support and cooperation will prevent unnecessary delays.

1. If your plan requires materials or personnel, be sure that you give sufficient time to others to comply with your requests.
    a. Ask yourself how the time and energy devoted to your project wil affect other obligations they might have. Specifically asking others for times when they would be available will prove useful.
2. Consider how this objective influences larger goals within the organization.

Criterion: Carrying out this suggestion should enable you to minimize problems or delays caused in inefficient planning where others are concerned.

To Minimize the Amount of Time Taken on Specific Tasks

If you find that tasks seem to take longer than they should because you are easily distracted or engaged in nonproductive behaviors (daydreaming, staring out the window, etc.), reorganize your schedule to reward yourself for concentrated effort.

1. For every half-hour you spend steadily working, reward yourself with a 5-minute break where you allow yourself to relax, walk around, etc.
2. Start with as small a work increment as you need and gradually work up to longer periods. A half-hour may be too long or short a starting point for you.
3. For a period of a week, choose one routine task daily to use this procedure.

Criterion: When the time required to accomplish each of these tasks is reduced by 25 percent, you will have accomplished the objective.

To Gain Practice in the Planning Process

Practice wil further improve your expertise in the planning process.

1. Write an in-depth analysis of a pertinent problem.
2. Outline what attempts at solutions have already been made.
3. Develop alternative strategies. Evaluate each of the alternatives using research, tests, and cost effectiveness analyses.
4. Conduct a similar analysis of a potential problem.

Criterion: When two in-depth analyses of pertinent problems and two of the potential problems meet with your manager's approval, you will have fulfilled this assignment.

To Gain Further Practice in Planning and Evaluating

By tackling further and more complex problems, you will not only improve your planning skills, but benefit your organization as a whole.

1. Write down a list of procedures and systems in your organization that have not been changed in the last 12 months. Ask yourself if the original conditions that caused the procedure to be established are still operative. If not, prepare at least two alternatives, focusing on their strengths and weaknesses as compared to the present system.
2. List the impacts of changing procedures and systems versus the expected returns.
3. Present these to your manager for their review.

Criterion: When you have identified two procedures that could be changed, and prepared alternative goals for accomplishing related goals, you will have completed this suggestion.

To Improve Estimates of Time Required to Complete Tasks

1. Before beginning a task, predict how long it should take.

2. Keep a record of your predictions and the actual time it requires for the next month. Compare the two and learn to set realistic goals by narrowing the gap between your estimates and the actual time.

Criterion: Mastering this suggestion will reduce the discrepancies between predictions and actual time required.

To Assess Time Spent on a Specific Project

Sometimes it may be useful to look at time spent on a specific project or task rather than your daily activities.

1. Keep a separate time log for a project. Define the activities for the project and assign time priorities to them. Record the time actually spent and compare with your predictions.

Criterion: When the time actually spent on a project falls within 10 percent plus or minus of your prediction, you will have accomplished this objective.

To Improve Daily Work Scheduling

When you are working on several projects or several portions of a single project at the same time, it is important to schedule your work activities so that everything will be satisfactorily completed in the time allotted. Good work scheduling helps to minimize last minute rushes at deadline times and helps to ensure that time and effort are not wasted on low-priority activities at the expense of more critical ones.

1. Prepare a log-in system for recording assignments. This system should allow you to record at least: the date the assignment was received, who assigned it, any established time commitments and deadlines, and the date on which it was completed.

2. Establish work priorities to help you determine the order in which tasks should be tackled and the amount of time which should be devoted to each.

3. Make a list of all the projects, or portions of the same project, that you are working on and then order them according to their relative importance.

4. Show this list to your manager or project leader so that they may make suggested changes regarding the order in which you have rated your tasks.

5. Maintain a daily To Do List over the next month.

   a. Keep a special notebook for your lists and assign a place for it on your desk.

   b. At the end of each day, allot 10 to 15 minutes for writing down what you want to get done the following day. Review your records of assignments and the stated deadlines to help you set your priorities for the next day's activities.

   c. If there is some conflict regarding deadlines, look back at the list of priorities you have set up to cover your job activities. This should help determine which deadline is of the most relevance.

   d. Cross off each item as you complete it during the day. When you are unable to complete the list, add the unfinished tasks to the next day.

6. At the end of 1 month, initiate a discussion with your manager or project leader regarding improvement in your capacity to schedule activities according to their priority. If you have not experienced a noticable improvement in your work scheduling, plan to repeat this procedure for another month.

Criterion: When you and your manager or project leader are satisfied that you are scheduling your workday activities in full accord with work priorities, you will have accomplished this goal. You should find that you are better able to cope with time pressures and thus feel less tension while working.

To Set Own Deadlines

Generating and meeting your own internal deadlines for completion of assignments has several advantages. Being able to complete a task or project in less time than you have been formally allotted can provide you with a sense of self-satisfaction. It will also display to others that you are willing to exert more than the required amount of effort within a given time frame.

Each time you begin work on a task or project over the next 3 months:

1. Set your own internal deadlines for its accomplishment. This should be done on the basis of a very careful analysis of the amount of time and effort that will be required for each subelement of the task or project. The deadline you set should be challenging enough so that you will have to stretch yourself to reach it, yet it should be realistic.

2. Try to better your own past performance. If you have comfortably completed similar projects in the past over a 4-week time span, aim to complete the present project in 3 weeks.

3. Pace yourself so that there is plenty of time between your own deadline and the formally established deadline. Then, even if unforeseen obstacles arise at the last minute to prevent you from meeting the deadline you have informally established for yourself, you may still be able to take corrective action in time for the formal deadline to be met.

4. Realize that problems beyond your control may arise to prevent you from meeting the deadlines you have generated for yourself. Do not be overly discouraged if some of your initial attempts to live up to your own deadlines are not successful.

5. Follow this procedure over the next 3-month period. At the end of that time, review the success you have shown in meeting your own deadlines.

Criterion: If you are successful in generating and then meeting your own deadlines you will find that you will have more time left to devote to other tasks.

To Meet Deadlines by Rearranging Priorities

While missed deadlines are sometimes inevitable in view of existing resources and conflicting demands, most deadlines can be met by examining and shifting organizational priorities.

Each time over the next 3 months when you realize you will have difficulty meeting a deadline:

1. Make a list of all activities your organization is involved in at that point in time.

2. Order these activities from high priority to low priority.

3. Plan to allot less time to the lowest priority projects.

4. Rearrange work assignments so that personnel involved in lower priority projects can devote their efforts to the highest priority project(s).

Criterion: If you are able to eliminate or minimize crises on at least two consecutive occasions over the 3-month period, you will have mastered this suggestion.

To Meet Project Deadlines Through Backward Planning

Backward planning is a useful technique to ensure that deadlines are met.

1. Over the next 3 months, each time you begin to work on a task which will require extended work, use backward planning.

   a. Starting with a target date for completion, work backwards and make estimates of what needs to be done each week prior to the target date in order to meet the deadline.

   b. In order that an accurate estimate is made of the time you will have available to work on the task, be sure to consider other work commitments you have during that same time interval.

2. Transfer these work objectives to the appropriate dates on a calendar specifically assigned for this function.

3. Review the calendar at the beginning of each work week to review your planned work targets.

4. If it is apparent that targets are not being met, decide how the backlog is to be handled. Will you put in more hours, put on more people, get outside help, or extend the completion date? If appropriate, consult with management before taking action.

Criterion: When you have met deadlines of four consecutive complex tasks, you will have mastered this exercise.

To More Effectively Utilize Your Time

If you are experiencing difficulty in managing your time and in meeting deadlines, it might be beneficial for you to keep a record of the manner in which you distribute your time among your tasks.

1. List all your duties and responsibilities and order them according to their relative importance.

2. Calculate the average amount of time you spend on each of these activities over the next 2 weeks.

3. At the end of this period, review the information you have acquired regarding your distribution of time. If you find that the majority of your time has been spent on jobs of relatively little importance, try to determine why this has occurred. It may relate to a motivational factor. For instance, you may have a preference for easier (albeit less important) tasks and as a result spend more time on them than is necessary. Perhaps you tend to avoid certain higher priority jobs because you see them as being difficult or boring. Or you may unconsciously be going into too much detail on a particular task.

4. Consider setting aside your most creative time period in the day for your most difficult and demanding tasks.

5. Discuss your ideas with your manager and seek further input as to how you can better manage your time.

6. Review your progress a month later.

Criterion: If you are mastering this activity, you should note an improved ability to meet deadlines by the end of the 1-month period.

To Minimize Last-Minute Decision Making

Having to make last-minute decisions is an inevitable part of the work function. A practical goal, however, is to reduce the number of decisions made in this manner and replace them with systematic planning.

1. Keep a record of your spur-of-the moment decisions for the next month.

2. Analyze this record at the end of this time period. Devise methods to incorporate as many of these last-minute decisions as possible into regular systematic planning.

3. Maintain the record for another 1-month period once you have implemented the above methods into your work planning.

Criterion: If you have mastered this exercise, the number of last-minute decisions required during the second time period will have been cut down by at least 25 percent.

To Improve Estimates of Time Requirements

Time schedules are ineffective unless they are based on accurate estimates of the time required for completing the various tasks. If you have difficulty adhering to your schedules, the problem may be arising because you are underestimating the amount of time it takes to complete the relatively simple, short-term tasks you perform in a day.

1. List every task you must currently perform in your job. Each task should identify a relatively discrete but meaningful activity (for example, coding a module) is more discrete than coding a program). Be sure to list all of the lesser duties you perform, for example, enumerate every paperwork responsibility you have.

   a. Check to see if your list is comprehensive by thinking about all that you did your last workday, from the time you reported to work in the morning to the time you left for home in the evening.

   b. Include a separate section listing all the unproductive activities you spend time on in any one day such as coffee breaks and socializing.

2. Rule five columns to the right of your task list and label the columns with the dates of the next 5 working days.

   a. Carry this list with you on the job for the next 5 working days and enter the amount of time you spend on each task each day.

   b. Do this by checking your watch before you begin each task and then tallying the amount of time you have spent as soon as you have completed the task, before you start something else.

   c. To get the most benefit from this exercise, it is important that this tally be as precise and accurate as possible, waiting until the end of the morning or the end of the day to record your time will most certainly result in a less accurate tally.

3. At the end of the week, compute the average amount of time spent on each task as well as the shortest and longest amounts of time each took. In addition, calculate the average amount of time you spend unproductively.

4. Finally, prepare a schedule for the next 5 working days, referring to your tally to determine exactly how much time you must allot for each task.

   a. During this week, record the number of times that you spend more time than expected to complete a task. Also, record proportionately how much longer each of these tasks took. (This is for your eyes only, so be honest.)

Criterion: Through this monitoring you will find that your time scheduling becomes more realistic and your work habits more efficient. Repeat this monitoring process periodically, as often as time allows, until you find that you are usually able to complete your work within the allotted time.

To Create an Organized Area of Work

An organized area of work will smooth the path for almost any task you perform. In this sense, it is the most fundamental of all planning efforts.

1. Institute the following steps over the next month.

   a. Arrange the desk surface and drawers to provide immediate access to supplies, writing utensils, forms, etc.

   b. Use trays and folders to organize papers.

   c. Allot 10 minutes per day for simply clearing off the materials on the desk.

   d. Write out and post in a convenient place specific information that you repeatedly refer to.

   e. Prepare a work manual that brings together information from various sources on the tasks routinely performed.

   f. Draw up a list of telephone numbers frequently called.

2. A manager is to inspect the work area in one months' time. A 3-to 5-month inspection should also be carried out to ensure that you maintain an organized work area.

Criterion: If your area of work is thoroughly organized, you should notice that the number of times you must search for materials is cut down at least by one-half.

To Capitalize Upon Strong Scheduling Skills

Put your strong scheduling skills to work on avoiding potential scheduling problems. Take a careful look at the kinds of things that have led to problems in the past.

1. Write a list of all the situations in the past 6 months in which backlogs or other schedule problems occurred.

2. For each of those situations, write out your best estimate of what led to the backlog, try to trace the problem back to its source (rather than reporting that one backlog was the result of another).

3. For every problem consider whether some action can feasibly be taken to diminish the likelihood of such an occurrence in the future. If so, briefly describe the action you propose. If not, indicate that.

4. Consider whether some kind of contingency plan can be developed for more effectively allocating manpower when such a problem does arise. For example, perhaps a more efficient mechanism is needed for immediately estimating the amount of time likely to be involved when a problem occurs, or perhaps improvements are needed in the manner in which such information is communicated--or in the way in which backup people are deployed. Write out one potential improvement that would enable your group to deal more effectively with such problems when they do arise in the future.

5. Review this work with your manager and take action to implement (or to more formally propose implementation, if that is required) any suggestions they approve.

Criterion: When you have developed and suggested to your manager two or more recommendations that you believe to be feasible and desirable for improving project scheduling within the context of your organization, you will have accomplished this goal.

To Reduce Response Time

Effective administration and coordination begins with effective utilization of your time. One very visible and measurable aspect of this is your own response time.

1. For the next week, carry a notebook with you and record the exact times at which:

a. You are notified of an emergency call from a customer

b. You begin traveling to the customer's location or you get ready to tackle the problem

c. You reach the customer's location

d. The service is completed

2. At the end of each day, take a moment to calculate the amount of time between a and b and between c and d for each emergency service situation.

3. At the end of the week, calculate the average amount of time you spend for the week between a and b and between c and d. Set your own goal; decide how much you should decrease the time you typically spend between a and b and between c and d.

4. List the two calls during that week in which the most time elapsed between a and b and the two calls on which the most time elapsed between c and d. Try to recall the details of these four time periods in your week, and for each of these four entries, list two ways in which you could cut the amount of time spent. For example, consider whether more efficient organization of your own materials would result in decreasing your unproductive time; or perhaps a more systematic way of handling your own paperwork would save your time; or even a brushing up on your technical skills with regard to a particular piece of equipment or type of service.

5. As a check on the effectiveness of the changes you have implemented, continue to record your response time until you meet your self-imposed goal.

Criterion: When you have reduced your response times by the amount you set as your goal, you will have successfully carried out this development activity.

To Reduce Amount of Time Spent Unproductively

Effective time management is a fundamental prerequisite for staying organized in your work. Unless you use your time productively, no amount of scheduling or planning will keep your work organized.

1. Rate your own productivity during each 1-hour period of every workday for the next week.

   a. Keep a notebook to record your ratings.

   b. Immediately following each hour, from the time you arrive at work to the time you leave for the day, take a few minutes to rate your productivity during that hourly period. Use a 5-point rating scale, with 5 designating fully productive and 1 designating completely unproductive. Be honest, these ratings are for your eyes only.

   c. Whenever you give yourself a rating of less than 5, briefly jot down ideas as to what you should, or should not, have done to increase your productivity during that period.

2. Analyze your ratings and your notes at the end of the week.

   a. Calculate your average productivity rating for each day (i.e., average over the hours in each day) and your average productivity rating for each hourly period (i.e., average over days for each hourly period).

   b. Identify times of the day in which you consistently were more or less productive than average. Review your notes to see what you were doing differently in these periods and to seek ideas as to how you might raise your productivity during the low periods.

   c. Read over all your notes, your ideas as to how each hour coud have been spent more productively, to identify trends. What is it that you often tend to do, or to avoid doing, that decreases your productivity? If you varied the time at which you did particular tasks, were you more productive doing them at one time that another (e.g., first hours in the morning versus the hours immediately after lunch)?

   d. Generate ideas as to what you might do to increase your average daily productivity, for instance, in organizing your daily work activities, you might consider setting aside your most productive time periods for the more difficult and demanding tasks, and your least productive periods for the most routine tasks.

3. Continue to rate and record your daily productivity. If you find that hourly ratings are too time consuming, you may instead rate and average your productivity after each half-day period (at lunch rate your productivity during that morning, and before you leave work for the day rate your productivity during the afternoon).

    a. Plot your daily productivity ratings on a chart. Watch to see whether they increase after you implement various ideas for improving your productivity.

Criterion: When you notice a significant improvement in the amount of quality work you are able to get accomplished during a normal day, you will have truly been successful in accomplishing this task.

To Generate a Log-In System

In order for you to effectively plan your work activities, it is necessary for you to have a clear idea of the outstanding tasks assigned to you.

a. Prepare a log-in system for recording assignments. This system should record at least the following information: the date the assignment was received, who assigned it, any established time commitments and deadlines, and the date on which the assignment was completed.

Criterion: When you have successfully maintained this log-in system for a period of 2 months, you will have completed this suggestion.

To Distinguish Between Standing Plans and Single-Use Plans

Standing plans are ones that are used over and over. Single-use plans, as the name implies, are used only once. The use of standing plans may save time, but can also result in a stereotyped response to a problem. A single-use plan takes more time to develop and may be less efficient.

1. Over a period of a month, keep a record of the two types of plans you use.
2. Determine which objectives might have been better met by using the other type of plan. Repeatedly used single-use plans should be, by definition, standing plans. Standing plans that are inappropriately applied cause difficulty by not fitting the specifics of a given situation.

Criterion: When you can correctly identify six plans according to the categories of standing versus single-use and justify your reasons for providing one category or the other for these, you will have mastered this suggestion.

To Include Adequate Evaluation Along With Your Planning

Minimize the unexpected by establishing evaluation criteria in the planning phase. Ask yourself what subgoals should be reached and when they should be accomplished. Try to predict potential problems before they occur and plan strategies for minimizing or alleviating them.

1. Over the next month, include evaluation criteria for each plan that you design or implement. What is it you wish to accomplish; how will you know when it is accomplished.
2. Define checkpoints. These may be on a time basis, such as weekly, or at specific points where partial objectives have been met. Writing these down in the planning outline will help you remember them.
3. Do not assume that because a job is assigned, it is done. Take the initiative to go out and check whether things are progressing as planned.
    a. If a co-worker is having difficulty, determine what changes in the original plan would alleviate the problem.

Criterion: When evaluation criteria for four consecutive plans meet with your manager's approval, you will have mastered this suggestion.

To Evaluate Your Planning

When things go awry with planning, it is often useful to find out how and why and prepare future strategies for preventing this from occurring again.

1. Keep a record of things that go awry with plans and procedures. When the project is completed, meet with the individuals involved to discuss how some or all of these might have been prevented. Continue this process over a month's time for all objectives that are in your domain.

Criterion: When the number of problems or errors in your planning has been cut in half, you will have achieved this objective.

To List Strengths and Weaknesses in Specific, Concrete Terms

Decisions are reflections of the accuracy and completeness of the data upon which they are based; providing specific estimates whenever possible will assist in informed dicision making.

1. Over the next month, list at least three strengths and weaknesses for each plan you generate. All estimates of strengths and weaknesses should be in concrete rather than in vague terms. Make estimates in terms of specific dates, dollar figures, and actions, rather than using words such as soon, much money, etc.

Criterion: Better planning should result from being as specific as possible about pros and cons of each plan.

To Minimize the Number of Changes Once a Plan is Implemented

Comparing actual expenditures of time and materials with predicted expenditures will lead to better planning in the future.

1. When implementing a plan prepare a checklist of time and material expenditures.
2. Note any changes in the original design and the conditions that necessitated the change.
3. Upon task completion prepare a list of actual time and material expenditures using your initial checklist as a guide.
4. Compare the two lists and note any discrepancies.

Criterion: When your planning requires one-third the amount of alterations, you will have mastered this suggestion.

To Extend Your Planning Expertise by Working With Others

Take the opportunity to broaden the perspective of planning functions and gain further experience.

1. Take part in an interorganizational project that would require you to generate and evaluate plans with unfamiliar personnel.
2. If possible, have your manager or someone else accompany you to these planning sessions and critique your performance.

Criterion: When you have taken part in an interorganizational project requiring planning and/or evaluation, you will have accomplished this suggestion.

To Gain Further Expertise in Planning Through Observing and Working With Others

The opportunity to observe and consult with others who are expert planners will help you with your planning functions.

1. Accompany your manager when they are involved in a planning capacity.
    a. Determine beforehand what role you will play in the proceedings and seek occasions that afford increasing responsibility.
    b. Have your manager provide you with necessary background information and coach you in your performance.

Criterion: When you have accompanied your manager on two occasions, you will have accomplished this objective.

To Increase Flexibility in Work Planning

By adopting a flexible attitude towards work planning, you will increase your ability to handle unforeseen situations.

1. Prepare a contingency (what if) plan for an upcoming organizational objective.
    a. Anticipate what problems are likely to occur and how to surmount them.
    b. Check your plan for comprehensiveness; if the original needed to be discarded for some reason, could the objective be reached through the use of your plan?

2. Present your work to your manager for critique.

Criterion: When, to the satisfaction of your manager, you have generated three contingency plans for upcoming objectives or goals, or one of your contingency plans has been implemented and proved workable, you will have accomplished this suggestion.

To Improve Ability to Modify Plans

To be effective in your position, you need to be capable of modifying work plans to adjust for unforeseen situations, such as changes in resources, organization, customer needs, and technology. To do so properly, you must be fully aware of all impacts such changes will have on your area.

Over the next 3 months, each time you encounter such unexpected situations:

1. Prepare a concise statement of the nature of the change.
2. List all of its ramifications pertinent to your assignment, such as the consequent impact on costs, schedules, etc.
3. Determine the extent to which present plans must be modified to account for each of the items in the above list.
4. List all actions you must take to ensure such changes are implemented.
5. Check these actions off as each is completed.
6. Keep a record of actions taken to meet unforeseen situations; have your manager critique this record to see if your actions were the best possible and used for solving the problem.

Criterion: As you improve in your ability to make necessary modifications to work plans, your record will indicate fewer and fewer instances in which you failed to take appropriate action.

To Avoid Others Losing Trust in You

Are you able to do all that you say you will? Unkept commitments diminish the amount of trust that others have in you.

1. Over the next month, keep a list of promises you make regarding deadlines or activities.
2. Determine whether a reorganization of your activities would facilitate your keeping promises or whether you should be more conservative in doing so.

Criterion: Following this suggestion should substantially reduce the number and impact of unkept commitments.

To Reduce Unanticipated Influences on Work Progress

No matter how successfully you can modify your plans to adjust for unforeseen situations such as changes in resources, specifications, and work assignments, these unforeseen situations are bound to be disruptive. It is important to strive to anticipate and plan for these types of situations so that they may be prevented or their disruptive effects minimized.

1. Keep a list over the next month of the unanticipated events (conditions/changes/tasks) you must react to. Record their causes, how they were handled, and the effect they had on your job performance.
    a. At the end of the month, review your list. Begin by ordering the unanticipated events. List those with the most serious repercussions first.
    b. Examine the listed cause of each event to determine if there was any way it could have been anticipated and thus its effects moderated or prevented. Ask yourself if the cause of the problem suggests a lack of planning, a failure to attend to detail, poor communication network, etc. Analyze each unanticipated event in this manner.
    c. Generate ideas as to steps you could initiate to prevent the recurrence, to anticipate and plan for, these types of unforeseen events.
2. Review the list with your manager or project leader and discuss the preventive techniques you have developed. See if they can come up with additional ideas. Work out the specific details for implementing each technique.
3. Beginning with the most serious problems, implement the preventive techniques into your work patterns.

   a. After they have become a regular part of your on-the-job routine, again keep track of the unforeseen situations you encounter over a 1-month period.

4. Compare the listings prepared over the 2 months. Look particularly to see whether the total number of unanticipated events has decreased and how many of the events that were unanticipated occurrences in the first month were also unanticipated occurrences in the second month.

Criterion: You will have been successful in accomplishing this goal if the same types of unanticipated events do not recur in the two periods (i.e., were foreseen as possibilities in the second period) and you can honestly attribute this lack of recurrence at least partially to your own efforts at anticipating and preventing unforeseen events.

To Gain Further Practice in Your Work Organization

Since you organize your time and work in an efficient manner, perhaps you can tackle projects of greater complexity.

1. Talk with your manager about new assignments that would make use of your organizing abilities or challenge you in other ways.
2. With your manager's permission, train a new employee or one who is experiencing difficulty in their work organization.
   a. Prepare a plan on how you would accomplish this and meet with your manager to discuss the results.
3. Use your talents to organize a social function for organization employees.
4. Ask for the opportunity to participate in an interorganizational work group or task force.
5. If your organizational unit enters a new area of responsibility, assume a leadership role in integrating new activities into existing ones.

Criterion: Taking on one new assignment or one of these activities a month for the next 6 months will indicate satisfactory completion of this objective.

To Further Improve Your Planning Skills

Assuming additional responsibility for planning will help you further improve your skills.

1. Prepare a master plan for an upcoming project or problem.
   a. Take the opportunity to make a formal presentation of your plan and get feedback on your work.

Criterion: When you have generated and presented such a plan, you will have accomplished this suggestion.

To Extend Your Planning Function Outside of Normal Job Responsibilities

The skills of planning and evaluating need not be restricted to your job duties.

1. To the extent where it will not interfere with your job, assume the responsibility of coordinating and planning an organization social event.

Criterion: When you have successfully planned an organization social event, you will have accomplished this suggestion.

To Exert More Effort in Planning for Goal Accomplishment

If you are willing to put forth more effort in your planning activities, it is more likely that crises can be averted if obstacles arise during the later stages of project accomplishment.

In your planning over the next 3-month period:

1. Identify alternative methods of accomplishing goals in the event that your original plans are blocked.
2. Prepare a list of major problems that could conceivably occur to either slow down or halt progress. Identify a few alternatives for solving each of these problems if they should later arise.
3. Keep a written record of the above information, rather than trusting it to memory.
4. If a delay or problem does occur:
   a. Refer to the alternatives you have developed.
   b. Choose the best alternative after consulting with your manager and/or other individuals involved.
   c. Implement this alternative and push to get the project back on track.

Criterion: When you have met deadlines on at least two occasions despite delays and problems that have arisen, you have mastered this suggestion. Planning time will be reduced and plans will be more effective.

To Capitalize Upon Planning Abilities

As one who plans well you can benefit from increased opportunity to expand your range of skills.

1. Consider changes in job assignments that would make more effective use of your planning capabilities. This might mean assuming responsibility for coordinating tasks that require the assistance of others or tackling more complex projects.
2. Solicit suggestions from co-workers on changes that could be made at the team or organization level. Ask them to detail a plan for changes that are feasible and allow some responsibility to participate in the implementation and evaluation phases.

Criterion: Following one of these suggestions will provide the opportunity for you to exercise planning skills in new capacities.

DEVELOPMENT ACTIVITIES

B. LONG-RANGE PLANNING

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To Anticipate and Prepare for Upcoming Changes

Once you have acquired an ability to cope with unforeseen situations as they occur, it is possible for you to begin turning more attention towards anticipating the unexpected. One of the best avenues through which you can pick up on clues regarding upcoming changes is via the communication network of the organization. If you increase your detection of the warning signals contained therein, you will be aware of and prepared for any necessary modifications to your work plans.

1. Record all information relevant to your area of assignment picked up in conversation with other personnel over the next 2 months. For instance, you might hear of a staffing problem in one of the service groups you depend on; or you might discover that the organization has signed a large contract that, although unrelated to your area, will use some of the same facilities you are using.
2. Record all potential red flag issues seen in written memos, correspondence and reports. For instance, policy changes and/or organizational shifts should always be looked at from the perspective of possible impacts on your area of responsibility.
3. Write down, in each instance, specifically what you heard or read and the source. Record potential ramifications as well as the action which you propose to take to prepare for these. If you feel that no action can be feasibly taken at this time state this.

Criterion: As you improve in your ability to anticipate upcoming events that will have an impact on your area of assignment, your record will show an increasing number of instances in which you were aware of and prepared for necessary modifications to your work plans.

To Improve Long-Term Planning of Own Work

When you can plan your work for several months in advance, you achieve much greater flexibility in responding to unforeseen events because you can readily anticipate the long-term implications of deviating from your daily or weekly work-schedules. Once you are adept at short-term planning, it is important to begin extending your time-frame over a longer scheduling period.

1. Make a list of all events (for example, planning and review sessions) that you are scheduled to attend for the next 3 to 4 months.
   a. List their dates and determine if any prior preparation is required. If so, determine how much time is required and when preparation should begin.
   b. Obtain a calendar with plenty of space for each day and transfer the information from your list onto the appropriate pages, blocking off the necessary preparation periods.
2. Make a list of all your assignments you know will be coming due in the next 3 to 4 months. Also list all the tasks you perform on a routine basis.
   a. Figure out what tasks are involved in completing each assignment and after considering the time requirements of each task, estimate how many hours or days you will need to spend completing each entire assignment.
   b. On your calendar, enter the deadlines for all assignments and then, working backwards to the present, block off sections of time until you have scheduled enough time to complete all tasks for each assignment. Designate which task and assignment you plan to work on in each time block. Remember to block off time each day/week/month for your routine tasks.
   c. Consider blocking off one afternoon or morning each week for catching up on loose ends accumulated during the week.
   d. Definitely block off and designate some time period each week as flexible time, time you can use to work on unforeseen tasks. The amount of flexible time you block off should depend upon the frequency with which unforeseen tasks arise in your work and the amount of time they usually demand. Remember, you can always use this time to get ahead of schedule on one of your assignments if nothing unforeseen arises. But by scheduling it in, you avoid falling behind schedule when these unforeseen tasks do, indeed, arise.

3. After you have prepared your calendar in this manner, review it with your manager. Ask if they have suggestions for additional entries you might make for further ideas concerning how you might refine your long-term planning efforts.

4. Update your calendar regularly over the upcoming 3 months. For example, block off time for new assignments as you receive them and, as it seems necessary, increase or decrease the time you have blocked off for current assignments.

5. Consult your calendar at the end of each day and week when you are doing your short-term time scheduling.

Criterion: When you feel confident in your ability to anticipate and compensate for the long-term implications of any interruption in your weekly work schedules, then you have accomplished this goal.

To Facilitate Future Planning and Avoid Crisis Situations

If you are not already doing so, begin keeping a calendar to plan future events.

1. For the upcoming month, fill in as many activities, tasks, etc. as are possible.

Criterion: When the number of unplanned tasks are one-quarter or less of total activities, you will have accomplished this objective.

To Increase Long-Range Perspective

In addition to concentrating on the here and now, it is important to devote attention to deadlines, follow-up dates, and future activities within the organization. By maintaining a longer-term perspective, you will often be able to exercise better judgment in day-to-day problem solving and decision making.

Over the next 6 months:

1. Maintain a long-term calendar to record all meetings (including time, place, and purpose), dates of policy changes, follow-up dates, deadlines, and any other activities that will impact on your organization.

2. Incorporate any additions, deletions, or date changes immediately into your calendar. Procrastinating on updating calendar entries is only likely to blur the memory and lead to inaccuracies.

Criterion: If you are conscientious in using and updating your calendar, any instances of overlooking important dates should be virtually eliminated by the end of the 6-month period.

To Improve Long-Range Planning Abilities

By possessing skill in long-range planning, you will be able to significantly influence the future direction of your organization.

Over the next 2 to 3 months:

1. Develop a long-range plan for your organization.

2. Focus in on one specific aspect of organizational activities. For example, you may want to concentrate on the long-term personnel needs of the organization and determine in what areas present personnel would have to develop themselves in order to meet these needs.

3. Determine specific objectives you would like to see accomplished by the end of a 5-year period.

4. Determine what intermediate objectives will have to be met in order to arrive at that final objective.

5. Work out a tentative timetable for accomplishment of each subgoal on the road to your final goal for the department.

6. Review this plan with your manager to discuss its feasibility and to seek additional input.

Criterion: If some elements of your plan meet with your managers approval, this will be an indication to you that this has been a worthwhile activity.

To Include Adequate Evaluation Along With Your Planning

Minimize the unexpected by establishing evaluation criteria in the planning phase. Ask yourself what subgoals should be reached and when they should be accomplished. Try to predict potential problems before they occur and plan strategies for minimizing or alleviating them.

1. Over the next month, include evaluation criteria for each plan that you will design or implement. What is it you wish to accomplish; how will you know when it is accomplished?
2. Define checkpoints. These may be on a time basis, such as weekly, or at specific points where partial objectives have been met. Writing these down in the planning outline will help you remember them.
3. Do not assume that because an action was taken it will have had the desired effect. Following up actions, particularly those that involve the effort of others, will ensure that planning is accomplishing its objectives.

Criterion: When you have generated evaluation criteria for four consecutive plans and utilized such criteria to determine whether the plan was successful, you will have mastered this suggestion.

To Assess Time Spent on a Specific Project

Sometimes it may be useful to look at time spent on a specific project or task rather than your daily activities.

1. Keep a separate time log for a project. Define the activities for the project and assign time priorities to them. Record the time actually spent and compare with your predictions.

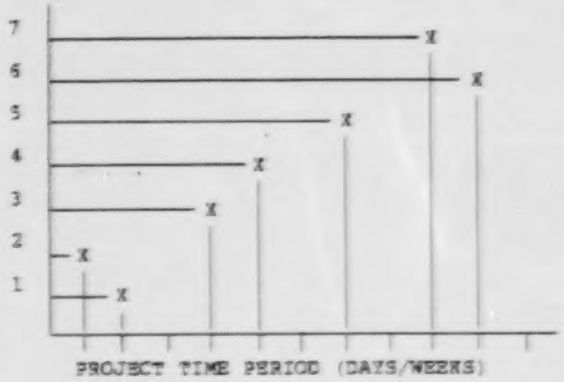
Criterion: When the time actually spent on a project falls within 10 percent plus or minus of your prediction, you will have accomplished this objective.

To Monitor Progress Toward Goals

It is important that you be able to monitor the overall progress on a project/assignment to ensure its completion within specified deadlines. Failure to do so can result in holding up the work of other company units and ultimately in poor customer relations.

The next time you direct a project or are given a task, monitor its progress in the following manner:

1. Analyze the project or design task to determine milestone events (specific achievements) to be met along the way.
2. Assign to each of these events a scheduled date of completion. (If other units, service groups, individuals, etc., are involved in the project, be sure to consult with them prior to assigning such scheduled dates.)
3. Prepare a milestone chart for the project similar to the following.



4. Post this chart in an easily accessible spot.
5. Compare actual date of completion with the projected date each time a listed event is met.
6. Establish dates when others are to provide interim reports to you or when you should check to ensure that acceptable progress is being made.
7. Maintain a file of these reports so that you are constantly aware of progress being made toward the final goal.
8. List all possible ramifications of any noted delays. For instance, if the completion of an event is required before work in other areas can begin, what additional delays can you expect?
9. Notify any personnel who will be affected by this delay.

10. Work out a plan to handle the listed ramifications. For instance, perhaps tasks that had originally been scheduled as being completed sequentially could be handled concurrently. Or added manpower might be recruited. (Similarly potential ramifications of meeting a milestone event at a date earlier than projected should be considered. It may be possible to step up the entire operation).

11. Enter the defined milestone events, their scheduled deadlines, and the actual dates of completion in a separate notebook.

Criterion: As you become successful in monitoring the overall progress of a project, the entries in your notebook will reflect an increase in the number of deadlines met. Repeat this on-the-job sequence until this notebook indicates that improvements are being made in scheduling and resolving problems.

To Capitalize on Strengths in Planning

Capitalize on your good planning skills by developing a plan over the next 2 or 3 months that would be geared toward accomplishing long-term organizational objectives written from the perspective of your own organization. Include in your plan such things as how your organization can be of more value, how your relationship with other organizations might be improved, and what new or improved products or services your organization might generate by the end of the next 5 years.

1. Work out a tentative timetable for implementation and discuss the feasibility of the plan with your manager.

Criterion: If some elements of your plan meet with your manager's approval, this will be an indication to you that this has been a worthwhile activity.

DEVELOPMENT ACTIVITIES

C. FINANCIAL PLANNING

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To Increase Knowledge of Cost-Reduction Techniques

Your job may require you to assess the cost effectiveness of components. To do so effectively, you should be aware of, and experienced in, various cost-reduction techniques.

1. Over the next month, obtain some readings on the method of value analysis. If possible, arrange for someone in the organization to instruct you in the approach.
   a. Meet with your manager to arrange for your involvement in an interorganizational team engaged in value analysis.
   b. The extent to which you become involved will, of course, depend upon your level of expertise in the area of financial planning. If you are a beginner, you may wish to simply sit in on the proceedings of the team. If at an intermediate level, you could become an active participant. If advanced, perhaps it would be feasible for you to take over the chairmanship of the team.
   c. Meet with your manager at the end of the project to review what you have learned through your involvement in this team effort.
2. Alternatively, review a design you have completed with value analysis in mind. If possible, enlist the aid of your manager and/or co-workers in this review.

Criterion: If this experience has been worthwhile, you should be able to transfer information gathered from your participation in value analysis to your day-to-day assessment of cost effectiveness.

To Increase Knowledge of Market and Technical Developments

It is important to keep up to date on developments in the market as well as technical innovations if you are to ensure cost effectiveness on the job.

1. Over the next month, investigate any outside information available to you to keep in the forefront of the market. Select at least three good sources from each of the categories below applicable to your market sector.
   a. Catalogues
   b. Trade journals
   c. Advertising magazines
   d. Trade directories
2. Present this list to your manager for their review. Discuss briefly the types of information available in these sources and how they can be used to help make on-the-job cost decisions.
3. Set up a schedule over the next 3 months in which you will review each of the selected sources.
4. Prepare a written outline of the contents contained in each source. The outline should list the types of information contained in the source, the credibility of this data, as well as what portions are most relevant to your work.

Criterion: If the above exercise has been worthwhile, you will make frequent use of these sources to help ensure cost effectiveness on the job. You will know their value and how they are most effectively used.

To Ensure Cost Estimates Are Based on Appropriate Back-Up Data

In order to provide an accurate cost estimate of a project, you must first obtain all back-up data relevant to the estimate. The following activity is designed to ensure that you have all such information available before you begin the necessary computations.

1. Prepare a checklist itemizing all factors that will influence a cost estimate. Minimally, this could include customer requirements; delivery rate schedules; specifications; material costs; a work breakdown structure; and average daily cost of involved personnel. The checklist should also include all factors in design that may have to be costed; i.e., systems design and analysis, design specification, design reviews, meetings, detail design tasks, design support, interface control, documents, etc.
2. Use this list each time you are asked to provide a cost estimate. Prepare a file folder and attach a copy of the list onto the front flap. Check off each item as the information becomes available and place the material in the folder. Do not begin any cost projections until all of the applicable items are crossed off.

3. Record your total projected cost estimate at the bottom of this list. Upon completion of the project, record next to this estimate the actual cost.

Criterion: As you improve, the discrepancies between projected cost estimates and actual costs will steadily decline. Keep such checklists operative until your projected estimates are within acceptable percents of the actual cost.

To Improve Accuracy of Projected Labor Costs

Projected material costs are made in a very straightforward manner. Listed prices are available for your reference. However, there is no catalogue to refer to when preparing an estimate of labor costs. If your total cost estimate is to be an accurate one, greater care must be taken with this portion of your calculations.

1. Follow this procedure the next time you are involved in preparing cost estimates.
    a. Prepare a breakdown of all functional tasks the project requires.
    b. Document projected labor costs for each of these tasks using a chart with columns for task, estimated labor hours, estimated labor costs, actual labor costs, and discrepancy percent between estimated and actual labor costs.
    c. The figures for actual labor costs and discrepancy percent between estimated and actual labor costs are to be calculated and entered onto the chart once an assigned task is completed.
2. Analyze the reasons for discrepancies, determine chart needs to be done, i.e., better task definition, improved design discipline, improved cost estimating, etc.
3. Institute corrective procedures.
4. Repeat the above documentation procedure the next time you are involved in preparing cost estimates.

Criterion: If the above exercise has been worthwhile, the record of estimated and actual labor costs prepared during the second project will indicate fewer discrepancies.

To Set Up a Personalized Historical Data Blank

In preparing a cost estimate, you will rely on your history in making the required judgments. The records of your achievements in the area of financial planning, can serve as a basis for effective budgeting if they are properly maintained for easy reference.

1. Prepare a list of the information to be included in your data bank. To help you in this task, review the last code estimate you prepared. List the types of data you gathered that might be beneficial in future financial planning efforts.
2. Determine how this data could be most readily classified and maintained.
3. Develop a time frame under which compiled data will be regularly updated to account for inflation factors.
4. Ensure that your data bank is operational within 1 month of assignment.

Criterion: Once your personal data bank is set up and maintained over a 6-month period, the requirements of this exercise will be met.

To Improve Monitoring of Project Expenditures

It is important that you closely monitor project expenses so that they can be held within established budget figures.

The next time you assume responsibility for a project or major design task follow this procedure:

1. Break up the project into phases. This could consist of a simple listing of a sequence of tasks; or, if the project is more complex, milestone events could be defined to provide tracking by 2- to 4-week intervals.
2. Determine the percentage of the established budget that should be expended upon each phase. These estimates are to be broken down in terms of labor hours, labor dollars, and material dollars.
3. Determine the actual costs and hours expended upon completion of each defined project phase.

4. Investigate all instances in which the actual expenditure is at an unacceptable percentage over planned figures. Determine whether corrective measures can be implemented to bring the rate of expenditure into line with project accomplishment and, if so, how soon this can be accomplished.

5. Notify management of the deviation and explain what measures you think should be instituted to correct for this.

Criterion: If you have met the requirements of this exercise, all deviations from projected expenditures will be acted on prior to completion of each project phase.

To Increase Communication With Management Regarding Project Expenditures

If management is to ensure that prompt action is taken to correct for deviations from established budget figures, you must keep them informed of any technical difficulties encountered.

1. List all potential red flag areas the next time you are engaged in project planning. This list should include areas in which accurate cost forecasts are traditionally difficult to make as well as potential technical hazards unique to the current or proposed project.

2. Determine the approximate dates on which work will begin on the listed areas and transfer a notation of this onto your calendar.

3. Keep a close monitor on work progress during the length of these listed activities. If you are not working on an area identified as high risk, ensure that you are kept fully informed of all development, either through actual observation or written reports.

4. Notify management of any deviations in work progress as soon as any identified risk becomes actual.

Criterion: If you have been successful, all deviations from projected work progress throughout the project will have been reported to management as soon as a difficulty is encountered.

To Further Increase Communication With Management Regarding Project Expenditures

When you are responsible for the technical direction of a project you must keep management advised of any deviations from current budget figures. A justification of these deviations should accompany the notification.

1. Each time a statement from accounting indicates a discrepancy between actual and budgeted figures, take the following action within 24 hours of its receipt:

   a. Use your original estimate to see where the source of the problem lies.

   b. Speak with the team members involved to determine the reasons behind the discrepancy and whether corrective measures can be taken.

2. Prepare a report to management within 3 days of the receipt of the statement from accounting.

Criterion: Continue this exercise until you have successfully stayed within the above time frame in five successive management negotiations.

To Set Up a Cost Estimate Manual

Capitalize on your expertise in financial planning by preparing a cost estimate manual for use by the entire organization.

1. With input from your manager, determine:

   a. The format the manual should take

   b. The type of information it should contain

   c. How it is to be updated and maintained.

2. Have the first draft of the manual ready within 2 months of assignment. The manual should:

   a. Be easily read

   b. Provide definite guidelines on preparing a cost estimate according to organizational policy

c. Contain a checklist of all items to be considered in a cost estimate

d. Provide information and data specific to the types of estimates your organization is engaged in preparing.

3. Make any necessary revisions suggested by your manager within 3 weeks of their review.

4. Publicize the availability of the manual to all involved personnel.

Criterion: The best indicator of the manual's worth will be the extent to which it is used as an aid in preparing cost estimates by employees in the organization.

To Improve Accuracy of Time and Expense Estimates Through Systematic Research

When planning a project or task or preparing a bid, you are responsible for developing a set of goals and accurately predicting the time and expenses required to achieve them.

When estimating a project:

1. Use past records to compare previous requirements.

2. Consult with individuals involved on time estimates.

3. Consult with the purchasing department on material and equipment cost estimates.

4. Over the next 2 to 3 months, each time you are engaged in project planning, prepare a breakdown of the tasks involved, their actual cost, and the number of hours devoted to each.

5. When the project (or significant portions of the project) has been completed, compare the actual expenditures with predicted expenditures to help increase accuracy in future estimates.

Criterion: Completion of this activity should result in increased accuracy in your predictions of project time and costs, estimates of worker hours, and expenses required to complete each task.

To Exercise Increased Expense Control

An effective employee is one who accomplishes job goals with close attention to costs and expenses.

1. Over the next month, keep a personal record of expenses incurred in the line of work.

2. Review these expenses at the month's end to determine what changes could be made to reduce costs. For each item, provide an alternative that might reduce costs.

3. Set a realistic goal for cost reduction and implement changes to meet your goal.

4. Determine which changes might be implemented and continue to keep records for a second month.

Criterion: Success will be measured by meeting your self-defined goal.

DEVELOPMENT ACTIVITIES

D. RESOURCE PLANNING

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To Ensure That Everything You Need to Perform Your Job is Readily Available

Do you find that you spend a great deal of time searching for materials or supplies? Not only does this activity waste time, but it will likely affect the smoothness and accuracy of your work.

1. Make a list of materials and supplies you need every day to perform your job. If they are not readily accessible or are in short supply, take appropriate measures to remedy the situation.
2. Do the same for materials you need only weekly, or on an even longer term basis.
3. Allow yourself 5 minutes at the end of the working day to ensure that everything you need for the next morning is available.
4. Start the workday with 5 minutes spent organizing both time and materials to adequately perform your duties for the day.

Criterion: A full workweek without having to search for supplies or run out of materials will indicate satisfactory completion of this objective.

To Ensure Required Data is on Hand Before Project Planning is Begun

Having needed information available before you start planning will prevent unnecessary delays and interruptions.

1. On the next major assignment, or over the next 4 months, each time you begin work on a simpler assignment/project, prepare a checklist of the information you will require to effectively plan your strategy for goal achievement. The checklist could include items such as:
   a. A statement of the project's scope
   b. Basic project objectives
   c. Customer requirements
   d. Product/design specifications
   e. Scheduled deadlines
   f. Required physical resources (tools, equipment, materials, etc.)
   g. Required human resources
   h. Necessitated liaisons with service organizations such as purchasing, fabrication, etc.
   i. Cost estimates
   j. Potential risk areas
2. Place the checklist on the inside flap of a prepared project folder.
3. Check off each item of data as it is obtained and file it inside the folder.
4. Prepare a written summary of the accumulated data once the checklist is complete.
5. Use this project folder as your basic reference source when planning the various phases of the project.

Criterion: As you improve during this 4-month period, you will notice a steady decline in the number of times planning efforts are blocked due to insufficient data.

To Make More Efficient Use of Available Reference Materials

Using available reference materials efficiently will make you more effective when it comes to diagnosing and repairing problems. In order to use those sources most effectively, follow this procedure:

1. Review each of the sources of information available to you and the specific information contained in each that is most likely to be important for your work.
2. Prepare for your own use a summary of what to look for in reviewing each information source.
3. Review this summary with your manager (or a more experienced employee designated by your manager) and ask them to check it for completeness and accuracy.
4. In the course of your work, review this summary sheet from time to time to refresh your memory about the sources of information available to you.
5. Monitor your own performance. Anytime you handle a problem that was hard to diagnose or solve, consider whether consulting any of the available reference materials would have made your diagnosis or solution easier. If you could have saved yourself time by using such information sources, make a note of this on your reference summary sheet.

Criterion: After following this procedure, you should be more familiar with these sources of information available to you, and you should see a reduction in the number of instances where you could have saved time by consulting some reference.

To Increase Knowledge of Available Reference Sources

You may need to frequently obtain or request information in order to complete a job. If you are familiar with the available reference sources, the time spent in tracking down such data will substantially decrease.

1. Prepare a Directory of References within the next 2 weeks. This should include:
   a. A Who's Who list of the personnel within your organization and those organizations with which you have close connections.
   b. A list of available reference material including a brief summary of all the manuals, brochures, books, files, logs, etc. that you use and where they are located.
2. The prepared directory is to be presented to your manager for review within 2 weeks of assignment. You are to make all suggested changes and additions to the directory brought up in this review.
3. Over the next month, each time information must be obtained, the directory is to be used to locate the appropriate source.

Criterion: If you have been successful, the time required to obtain required information will have been cut down by at least 25 percent.

To Avoid Repeated Requests for Information and/or Assistance

You may need to frequently request information and/or assistance in order to complete a job. However, it is important that you think through such requests prior to making them to ensure that all required information is obtained at one time. Otherwise, there will be needless disruptions to the work of other personnel.

1. Make an initial review of all assignments received over the next month. Before the actual work begins:
   a. Review each step involved in the job.
   b. Write down in short note form any information and/or assistance you will require to complete each step.
   c. Classify the notes according to the individuals who will be able to provide the required information.
   d. Use these notes to form an outline of requests for information and/or assistance.
2. Keep a running record of the number of times you must turn to other employees for information and/or assistance during this month.

Criterion: When you have mastered this exercise, the number of times you interrupt the work of other employees will have been cut down by at least one-third.

To Prevent Your Lack of Organization Affecting Others

If others are unable to find needed supplies, their performance will be impaired. If you are counted upon to finish a task by a certain deadline, noncompletion may have repercussions for the team or organization.

1. Ask organization or team members for feedback when they have difficulty locating material that you are responsible for or when information is incomplete or otherwise inadequate.
2. Let others know how and where you have filed materials and documents.
3. Organize supplies and materials on a team basis. Ensure that there is a system for replenishing supplies when someone notices they are in short supply.

Criterion: A week in which no others are inconvenienced or delayed because of your lack of organization will indicate successful performance in this area.

To Locate Materials More Quickly

By knowing where materials are located, you will be able to make more efficient use of your time and will not be slowed down in completing projects and assignments.

1. Familiarize yourself over the next month with the location of various materials you often need to use in your work. Even if others are actually responsible for procuring these materials, you should at least be aware of their location.

2. Ask questions when you are unsure as to where materials are located. This is preferable to searching futilely on your own for a long period of time.

3. Keep notes on the information others give you. In this way, you will never have to ask the same question twice. You will also be more readily able to respond to others when they have questions in the future about the location of materials.

Criterion: If you are making progress in this area, you should find that you are showing more self-reliance regarding the location of materials and that you are asking substantially fewer questions of others. Instead, most of your questions will be limited to unique situations which arise where you must use new materials whose locations are unfamiliar to you.

To Keep Materials and Supplies Stored in Their Proper Place

Materials and supplies should be returned to their original place when they are no longer needed, or they should be temporarily stored near the work site if you will not be making use of them for a period of time. Some materials can be damaged or spoiled by being left unprotected. However, you are accountable for materials and supplies you personally use in carrying out your work and, thus, should take responsibility for seeing that they are properly stored. In addition, by keeping materials and supplies in an established location when they are not in use, others who may need them will know of their availability.

Over the next month:

1. Return any materials and supplies to their proper location if it becomes apparent that you will no longer need them for the purposes of the project and assignments you are presently involved in.

2. Follow the established check-in system for your area when you return these materials and supplies. By doing so, others will be aware of their availability.

3. Temporarily keep materials and supplies that you will not need in a location in or adjacent to your work area and in a way that will not interfere with the other activities you will be involved in during the interim.

4. Make certain that these materials and supplies are not left unprotected while they are temporarily not in use. Also make certain that they are arranged in such a way that they do not interfere with the work activities or safety of others within your area.

5. Let others know where the materials and supplies are located, in the event that they will need to make use of them during that time.

Criterion: At the end of the month, review any changes that have occurred as a result of undertaking the above activities. Comments you receive from others should indicate that they have been more readily able to locate materials and supplies and that there have been no instances of avoidable damage or spoilage of materials and supplies for which you were responsible.

To Better Organize Materials in Your Organization

It may be helpful to you and others to reorganize materials or files in your organization.

1. Take a few minutes to think about how materials might be better organized in your organization. Make a list of your suggestions and present them to your manager for their comments. If your suggestions are favorably received, design a plan for implementation and informing others of the changes.

Criterion: When you have presented a list of four or more changes to your manager and received permission to implement one or more of these changes, you will have accomplished this objective.

To Improve Safety on the Work Site

In order to prevent accidents, you are responsible for organizing your work site in such a way that it is neat and clear of potential hazards.

1. Arrange for either your manager or a member of any established safety committee to inspect your work area within the next week. Together, draw up a checklist of the physical elements within your working environment that must be controlled for proper safety. Review on-site material storage, proper floor loads, clearance space required in walk ways, safe arrangement of equipment, light and ventilation, etc.

2. Eliminate within 24 hours any existing hazards that have been pointed out during this inspection.

3. Use the prepared checklist to make routine inspections at the beginning of each work week rather than wait until monthly inspection time is nearing. Check off each item which has met the established safety standards. Take care of any substandard conditions that same day. Continue such routine inspections over the next 3 months.

4. Review your checklist at the beginning of each month to see if changing physical conditions require new items to be added.

Criterion: As the safety of your work site improves, the number of items checked off at the beginning of each week (indicating that safety standards have been met) should be near 100 percent.

To Avoid Paperwork Errors in Ordering Materials

Not ordering the proper materials can be a costly mistake. It can also lead to unnecessary delays and missed deadlines.

Each time you become involved in material planning efforts over the next 6 months:

1. Prepare a checklist of all necessary materials that will be needed for a project. Do not rely on your memory during your planning discussions with others. Write everything down, and then use this information as a checklist when ordering materials.

2. Complete the proper requisition forms in ordering all materials. Not doing so will only lead to unnecessary delays.

3. Seek guidance from others if you are uncertain as to the information required on each form.

4. Check purchase orders against purchase requisitions for accuracy.

Criterion: Monitor your own progress in this area over the next 6 months. If you are using forms properly and are exercising care in double checking them, any instances of preventable misordering should have disappeared by the end of that time.

To Minimize Errors in Ordering Materials Because of Design Problems

Not ordering the proper materials can be a costly mistake. It can also lead to unnecessary delays and missed deadlines.

Each time you are involved in material planning efforts over the next 6 months:

1. Be sure that the design is documented and that the parts lists are controlled before materials are ordered.

2. Ask questions of others if there is any doubt as to the completeness or accuracy of the design.

3. Determine exactly what materials are needed and in what quantities.

Criterion: Monitor your own progress in this area over the next 6 months. By the end of that time errors in ordering materials should have been substantially minimized, although some misordering may still be inevitable because of subsequent design changes.

To Maintain Appropriate Inventory Level

While inventory within your immediate work area should typically be kept at a minimum level, it is important for you to recognize when inventory has reached a low enough point where materials should be reordered. Not requisitioning needed materials and supplies on a timely basis can lead to unnecessary delays in completing projects.

If you become directly involved in material planning efforts over the next 6 months:

1. Make estimates as to how long available materials and supplies will last.

2. Determine if there is a sufficient stock of these materials and supplies in the central storeroom used by all organizations or if they will need to be ordered from an outside vendor. If the latter is the case, you will, of course, need to allow more lead time for delivery of the materials and supplies.

3. Take into account your findings to determine at what point materials will need to be reordered so that the present inventory will not be depleted before these are delivered.

4. Mark these dates on your calendar rather than trusting them to memory.

Criterion: If on-hand inventory is kept at a minimum, yet you have taken steps to ensure the availability of materials and supplies when they are needed, there should be a noticeable drop in delays brought about by poor material planning over the next 6 months.

To Ensure Availability of Materials When They Are Needed

Not having required materials on hand when they are needed leads to unnecessary delays and can be upsetting to many people's work schedule.

Each time you undertake a project or direct the testing or production of a product over the next 6 months:

1. Take steps to ensure that tools, supplies, equipment, and all other materials needed to support product schedule requirements will be on hand when needed.
2. Prepare a breakdown of all functional tasks involved.
3. Draw up a list of all materials and equipment required for each of these functional tasks.
4. Determine the time deadlines by which you will need to obtain each item listed.
5. Determine availability of each of these items through communication with the appropriate service group.
6. Evaluate the results of your efforts and determine what might be done in the future to improve availability of materials when they are needed.

Criterion: If you have taken the proper steps to ensure the availability of all necessary resources, there should have been a noticeable decline in delays over the 6-month period.

To Provide Materials When They Are Needed

Not having required materials on hand when they are needed leads to unnecessary delays and can be upsetting to many people's work schedules.

Follow these suggestions the next time you head up a project team:

1. Plan far enough ahead so that all materials will be available on or before the date they will be needed.
2.
3. Inform your supply sources of any changes in schedule as soon as you yourself know of the changes. For example, if a deadline for completion of a project or one of its subtasks has been moved up, individuals on whom you depend for materials should be made aware of the changes as soon as possible.
4. Request that team members keep you well informed of the progress they are making and whatever difficulties they are encountering. For example, if a new operation is requiring more material than was originally planned for because some of the material has had to be scrapped, you should be informed of this as soon as possible. In this way, corrective action can be taken to eliminate the waste and additional, perhaps different, materials can be ordered before too much time and money are lost.

Criterion: If you are successfully mastering this suggestion, there should be a noticeable decrease in the number of delays that occur due to lack of material.

To Reduce Material Costs

The cost-conscious employee should seek to utilize materials that will provide the greatest savings to the organization, yet at the same time will result in a high-quality product that is in conformance with customers' specifications.

The next two or three times you are involved in material planning efforts for a project:

1. Investigate two or three alternative sources for obtaining the materials you need.
2. Calculate the savings that would result from using these alternative sources as opposed to relying on your usual sources.
3. Determine if these savings are real or only apparent. That is, an alternative source may be able to provide you with materials at lower per unit cost, yet the cost of transporting the material to your site would outweigh any cost savings and thus make it unfeasible for you to rely on this alternative source.
4. Discuss your findings with your manager and with individuals who will be involved in the project. Together determine which source of materials will prove more cost effective over the life of the product.

Criterion: If you are able to successfully identify and make use of an alternative lower-cost source of materials on at least one occasion over the next several months, this will be an indication of your progress in this area.

To Identify Alternative Sources of Materials

While you should as often as possible utilize available materials in completing your work, it is also important to be aware of alternative sources for obtaining these materials in the event that materials ordinarily used are not available when the need arises. In this way, there will not be frantic last-minute attempts to locate alternative sources and there is a better chance that a project can get back on schedule.

Over the next 6 months:

1. Plan to obtain needed materials for projects from your normal sources.
2. Identify at least one alternative source for each of these materials.
3. Refer to this information if normal supply channels become blocked.
4. Determine if it is preferable to obtain materials from these alternative sources or if it is better to wait until you can obtain materials through your usual source. For example, will the time savings obtained by using the alternative source justify any additional material costs that might be entailed?
5. List all the advantages and disadvantages of using this alternative source to obtain materials. Weigh all the information you have and try to come up with your own judgment about the situation. Then discuss your findings with your manager and together decide on the best course of action. That is, determine which way of obtaining materials is least likely to put the project further behind schedule.
6. Document all such instances where you identify alternative sources of materials and review this information at the end of a 6-month period.

Criterion: If some of your recommendations for alternative sources are accepted over the 6-month period, and if using these alternative sources has helped you and others meet original deadlines or at least has not put projects further behind schedule, this will be an indication to you that this activity has been worthwhile.

To Determine Preferred Materials

While similar materials supplied by different vendors may all be within specifications, they may differ in terms of their workability and practicality. To improve the long-term efficiency of the organization, it is important that you pay attention to these differences and if necessary propose that changes be made in the materials that are used.

Over the next 3 months:

1. Record the exact nature of any difficulties or problems you and others encounter in working with certain materials on tests and projects. Also note any particular advantages of these materials.
2. Review this record at the end of 3 months. If the difficulties and problems appear to strongly outweigh the advantages of working with a particular material, investigate similar materials available from other vendors.
3. Test these new materials to determine if they meet requirements.
4. Document all difficulties and problems that arise in addition to the advantages in using the new materials.
5. Decide with others at the end of the trial period if it would be desirable to continue using the new materials on a long-term basis.

Criterion: When feedback you receive from others indicates that the new materials are more practical and are helping them perform their work more efficiently, you will know that this activity has been worthwhile.

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To Make More Efficient Use of Available Equipment Materials

One component of effective material planning is being able to distinguish between real and apparent equipment and material needs. At times, there may be a genuine need for new equipment and materials. At other times, though, the solution to the problem may lie in reallocation of existing equipment and materials to areas where they are needed or more efficiently used.

The next time a situation arises where you feel additional equipment or material is required in order to perform your work satisfactorily, follow these suggestions.

1. Determine if the equipment and/or materials you need are available elsewhere and are not presently in use. If so, follow established procedures in obtaining the equipment or material.
2. Try to determine if other individuals using the equipment or materials you need are using it in the most efficient way possible. For example, if a particular piece of equipment always seems to be in demand during certain time periods, suggest to your manager the possibility of rotating the times that the individuals involved will have access to it. By doing so, you and others will be making more effective use of equipment already available, rather than the organization needlessly investing money in the purchase of a new piece of similar equipment.
3. Prepare a justification for additional equipment or materials if, after taking the steps above, you still feel that the need exists. Be sure to follow established procedures in preparing this justification and presenting it to your manager.
4. Continue to look for ways over the next 6 months in which existing equipment and material can be more efficiently used.

Criterion: Review your progress at the end of the 6-month period. If you have been able to successfully identify new ways of more efficiently utilizing available equipment and materials in your own work and if a few of your suggestions have been accepted and implemented by others, this will be an indication to you that this activity has been worthwhile.

To Capitalize on a Thorough Knowledge of Safety Requirements

Capitalize on your strong respect for safety on the work site by volunteering to organize and maintain an employee safety suggestion program if this would be applicable within your area.

1. Draw up a proposal for implementing this program with input from your manager. Determine:
   a. How employee suggestions will be relayed to you--in person, on a prepared form, by memo, etc.
   b. What kind of recognition should be given to employees, such as a by-line for the suggestion in an organization publication or a monetary reward
   c. How employees will be informed of the program's existence
   d. Ways in which you can sustain interest in the program
   e. The procedure by which an approved suggestion should be implemented
   f. How good safety ideas can be communicated to other units and groupings within the organization
2. Decide upon a reporting system by which you can keep track of:
   a. The number of suggestions you receive
   b. Their quality
   c. How, if, and when they were implemented
3. Ensure that the program is operational within 2 months of your initial involvement.
4. Use the reporting system conscientiously and meet with your manager periodically to review these records, to discuss any questions you may have, and to discuss the value of the program in general.

Criterion: If the program is worthwhile, the number of reported accidents in your section should steadily decrease.

To Capitalize on Strengths in Material Planning

Capitalize on your strengths in this area by requesting the opportunity to become involved in longer range material planning efforts, perhaps as head of a team.

1. Meet with your manager over the next month or two to discuss possibilities for your involvement in longer range material planning activities.
2. Determine together:
   a. What the focus of your involvement is to be. For example, you might investigate the need for certain large-scale capital equipment expenditures. Or you might investigate how current materials can be improved upon or substituted by equivalent but lower cost materials.
   b. The length of your involvement in this activity.
   c. Who the team members will be.
   d. When and in what form the group's recommendations should be submitted for consideration.
   e. Discuss the team's progress with your manager at mutually agreed upon points in time.

Criterion: If a few of the recommendations developed by your team are eventually accepted and acted upon, you will know that this has been a worthwhile activity.

DEVELOPMENT ACTIVITIES

E. VOLUME OF WORK

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To Accurately Assess Employees' Volume of Work

The first step to improving the volume of work is to assess the amount that you are presently accomplishing.

1. Keep a record of work accomplished for a given week or ask a manager to perform this task.
2. Record the number of incomplete assignments or deadlines that are missed for a given month.
3. Examine, alone or in cooperation with your manager, the accomplishments and deficiencies to define remedial actions. The attempt should be to delineate problem areas that are amenable to correction.

Criterion: A record of performance for a week and missed deadlines or insufficient volume for a month will indicate completion of this suggestion.

To Increase Margin in Employees' Performance

You will not be able to deal with an increase in work load if your job requirements are already taxing you to the limit.

1. Determine if your work load is appropriate. Consider whether a redistribution of assignments might be in order.
2. If you appear to be unduly taxed by routine job assignments, factors such as physical or emotional health may be the cause. Other indices of health-related problems might be increased irritability or nervousness. Seek appropriate resources for remedying the problems.
3. Your manager will discuss with you ways in which efficiency could be increased or work accomplished in less time. Perhaps your are being too exacting in your performance of work duties.

Criterion: Implementing this suggestion should result in your ability to handle work increases more effectively.

To Use Goal Setting as a Method for Improving Output

Goal setting can be a useful way to improve the volume and quality of work.

1. Each morning, list what is to be accomplished during the day. The goal should be set high enough so that it presents a challenge.
2. At the end of the day, activities that were completed should be crossed off the list.

Once you reach a point where a substantial proportion of these daily goals are accomplished, you should expand this activity.

1. For the next month, list activities that take place on a weekly basis.
2. At the end of the month, review the list with your manager to determine if changes or increases in the goals are warranted.

Criterion: Completion of this suggestion should result in a 90 percent accomplishment of the goals that are set.

To Cope More Effectively With Increases in Work Load by Developing Flexibility on the Job

Flexibility in the way you carry out tasks will be useful if changes in conditions require alterations in work assignments.

1. In instances where flexibility in procedure is permissible, you can avoid getting into a rut by varying the order in which particular tasks or jobs are performed.
2. If work tends to be routine, your manager will periodically provide something out of the ordinary for you to do. Not only will this be useful if sudden changes are necessary, it should increase motivation.
3. Your manager will allow for your input into the manner in which work that requires increased output is performed. Often you will have hands-on knowledge that will prove useful.

Criterion: By following these suggestions, you should handle increased work loads more smoothly.

To Cope More Efficiently With Demanding or Complex Work

Each individual has peak periods when they work most efficiently. You can capitalize on these peaks by scheduling the most difficult or complex work task during this peak period.

1. Keep a record of the volume of work completed each morning and afternoon for a month. By reviewing this record to determine when output was the largest, you can identify the period when individual performance peaks.

2. Consult with your manager to try to schedule the most complex and demanding tasks performed each day within those times. Such scheduling should decrease the amount of time it takes you to handle such complex and exacting tasks.

Criterion: Determining peak work period and scheduling complex work during this period should decrease the amount of time these tasks require.

To Improve Concentration on the Job

The amount of work accomplished will depend upon your ability to immerse yourself in work.

1. Identify distractions that prevent you from optimal functioning.

2. When pursuing a task, clock the amount of time required to do a job.

3. Identify the length of time continuously involved in work without engaging in nonproductive activities (daydreaming, looking out the window, etc.). Strive to gradually increase this time over a 2-week period.

4. Keep track of your break time for a week. This need not be communicated to the manager, but will prove useful for your scheduling of work time.

Criterion: The identification and removal of distractions should cut job time by 25 percent and increase the length of involved time by 25 percent.

To Reduce Time Lost by Ensuring That Employees Follow Appropriate Processes

Time lost due to your needing help can cut productive work time substantially. If you continually have problems, it may be due to not using the appropriate production processes.

1. Your manager will select an employee who has a good understanding of the particular production process in question. This employee can serve as an advisor to you by walking through the total production process with you. You should take notes on each step of the process, paying particular attention to those areas in which your own procedure differs from that of the advisor's.

2. Each time you work on the process in question, review the notes on the standard procedure. If time permits, refer to these notes before each step in the procedure. Faithfully following the outlined procedure should reduce the number of times you must seek outside help.

Criterion: The requirements of this exercise will have been completed when the number of times you must seek outside help is reduced by a percentage agreed upon by you and your manager.

To Increase Efficiency of Work Procedures

If efficient work procedures are employed, the time required to complete a task will be substantially reduced.

1. Select a task that is relatively time consuming and carried out repeatedly. Over the next 2 weeks evaluate your approach to this job. To do this in sufficient detail:

   a. Obtain a notebook. Record each step you take and the time needed to complete it.

   b. When the task is completed, critique each step in terms of its necessity and the time element involved.

   c. Prepare a written revision of the work procedure and use the revised procedure the next time you perform the task.

The amount of time the job requires is to be calculated using first the original procedure and secondly the revised procedure.

Criterion: If you have increased the efficiency with which the task is handled, there should be a reduction in the time required to complete the job.

To Cope More Effectively With Work Pressures

You may be avoiding certain activities or failing to meet some responsibilities because they are particularly difficult to cope with and/or are stressful.

Job-related stress evokes unpleasant emotions such as anger, anxiety, and frustration, that block out our capacity for coping with problems and dealing with people on a rational, thoughtful basis. Hence, the maintenance of composure in the face of mental and emotional stress is of the first priority in successful job performance.

1. To help develop control in this area, keep a diary of the stress-provoking situations and/or crises encountered over the next month.

   a. In the first part of the narrative, write down the emotion during the episode. Let the anger and frustration out in writing, relax for 10 minutes, and then make a conscious effort to remove yourself emotionally from the situation.

   b. Keep an objective record of what was said or done. Then, try to track down the consequences of the behavior. For example, did something you say result in an escalation of frustration. What kind of reactions were exhibited by others to your comments?

   c. Make a note of what could be done differently if it were possible to reenact the scene, and why.

2. After you have analyzed feelings and actions in this manner, talk to some of the other people who were involved in the situation.

   a. Ask them about their feelings regarding the situation and how they cope with this type of stress. (If anger was expressed during the stress encounter, try to clear the air.)

3. At the end of the month, review the diary to see if the objective chronicling of actions and the evaluation of the consequences has led to any improvement in response to stress-provoking situations.

   a. Your manager will work with you to see if you can detect your typical reactions to stress. Together, determine if a more constructive strategy could be adopted.

   b. Identify areas in the work situation where the greatest pressure and stress occur. See if there is any way to reduce exposure to these areas without hurting job performance.

Criterion: When you have completed this process and are coping more calmly and effectively with work pressures, this goal will have been accomplished.

To Improve Distribution of Time Among Job Duties

If work is to be completed within specified deadlines, the manner in which time is distributed among job duties must be carefully controlled.

1. List all of your various job duties.

2. Order these according to their importance.

3. Present this list to your manager for a review of established priorities.

4. Over the next 2 weeks, calculate the average amount of time spent on each listed activity.

5. If the distribution appears to be skewed so that the majority of time is spent on jobs of low priority, pick two or three low priority jobs that are consuming a large portion of the work day.

6. For the following 2 weeks, try to cut down the time you spend on the selected low priority jobs. You could:

   a. Establish a more efficient procedure for accomplishing the work.

   b. Increase the work pace when tackling these activities.

7. The amount of time allocated to these low priority jobs is to again be recorded during this 2-week period.

Criterion: If you have been successful, the total time spent on the selected low priority jobs during the second 2-week interval should decrease by at least 25 percent.

To Ensure That Time Spent Accurately Reflects Priorities

Since some activities are more important than others, sufficient time should be allotted to activities of higher importance before those lower on the priority list are carried out.

1. Make a daily priority listing of tasks for the upcoming week.

2. Prioritize the tasks by using a 1 to 5 scale with a 1 indicating assignments of relatively low priority and a 5 indicating tasks of major importance.

3. Have your manager check the list for suggestions and revisions.
4. For each item on the list, record the amount of time spent.

Criterion: Continuing this process for a second week should result in a significant change in time allotted to high and low priority items, with the former increasing and the latter decreasing.

To Increase Work Pace by Improving Work Skills

The development of expertise in your work skills areas is a definite asset to your work pace.

1. Prepare an outline with each of your job activities comprising a major heading.
2. List under each heading the skills and abilities that relate to the job.
3. Write out suggestions across from each listed skill as to how added expertise could be gained. For example, the rapid computation of data requires a thorough knowledge of basic mathematics. Suggestions for development could include:
   a. Doing puzzles in mathematical sections of local newspapers and magazines
   b. Learning the methods for checking the accuracy of addition, subtraction, multiplication and division
   c. Obtaining books of collections of arithmetic puzzles and working on solving them
   d. Memorizing the decimal equivalents of common fractions
4. Present the completed outline to your manager within 1 week of assignment so that they can make additional suggestions.
5. Over the next 2 months, allot at least half an hour per day to following up on the developed suggestions. If there is a lapse in your work load, you may be able to devote some time on the job to this plan; however, check this out with your manager beforehand.

Criterion: If you have been successful, you should notice an increase in the average amount of work you can complete during a work day.

To Capitalize on a Swift Work Pace

Once you have acquired the methods and skills necessary to complete work within specified time limits, you might find that you have worked yourself out of a job, that is, your skill has resulted in leaving you without enough to do.

1. Your manager will meet with you to determine whether you could assume additional responsibilities. Suggestions for broadening job scope could include:
   a. Taking on a special project
   b. Doing work that would benefit the organization but which, up until now, no one has had time to do
   c. Organizing and adding to the various information systems of the organization
2. Your manager will hold a feedback discussion with you in 1 month's time to review any problems you might have come up against in assuming these new responsibilities.

Criterion: Once you have taken responsibility for at least one additional task, the requirements of this exercise will have been met.

To Capitalize Upon Good Work Volume

When you consistently produce a high volume of work, this should be recognized and utilized to help others perform more effectively.

1. Seek opportunities to assist others who are experiencing difficulty or to train a new employee.
2. Share helpful hints that facilitate successful performance. This might be accomplished through a newsletter or informal discussions.

Criterion: Following this suggestion should result in continued superior performance and also significantly improve the performance of others.

DECISION MAKING

A. DIAGNOSING PROBLEMS

- Recognizing problems when they occur
- Gathering information regarding malfunctions
- Developing diagnostic skills
- Increasing speed and efficiency in diagnosis
- Accepting assignments involving increasingly complex problems

B. ANALYZING AND EVALUATING

- Anticipating potential problems
- Avoiding problems
- Assessing alternative solutions
- Examining and evaluating past decisions

C. PROBLEM SOLVING

- Clarifying the situation and who is responsible for making the decision
- Communicating corrective decisions promptly
- Generating alternative solutions
- Improving troubleshooting skills
- Prioritizing problems and working to relieve stress in the situation

D. CRISIS ACTION

- Recognizing warning signs and minimizing the crisis by not overreacting
- Maximizing effectiveness in a crisis situation by reducing stress
- Improving ability to handle unexpected events
- Documenting and analyzing successful responses
- Avoiding crises

E. PRODUCT/SYSTEM MAINTENANCE

- Completing on-site diagnoses of machine and/or application/system malfunctions
- Determining how systems can be altered to accommodate the application
- Resolving problems identified by internal and external customers quickly and accurately

DEVELOPMENT ACTIVITIES

A. DIAGNOSING PROBLEMS

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To Recognize a Malfunction or Problem When It Occurs

The first step in problem diagnosis is recognizing a problem when it exists. Sometimes this is obvious as in the case where a piece of equipment suddenly ceases to function; often, however, problems are more subtle and require a discriminating eye to determine that something has gone wrong.

1. Over the next month, on any new equipment, decide whether it is operating properly, how you made the decision, and what potential problems might occur. Put these in written form and review this with your manager.

2. For equipment with which you are familiar, keep a notebook of problems encountered, probable causes, and remedial actions taken. For each piece of equipment, also indicate problems that might occur.

3. For each piece of equipment, keep a daily list for a period of one month. The list should contain information such as date, equipment, fully functioning, warning signals and malfunctions.

Criterion: When the number of malfunctions recognized is increased, the time to repair is significantly reduced, and you can demonstrate proper functioning for each piece of equipment, this suggestion will have been mastered.

To Improve Familiarity With Equipment

Increased knowledge about apparatus will permit you to recognize problems sooner and diagnose them more accurately. The technical manual can provide information that is useful at many stages of the diagnostic process.

1. Read the technical manual for four pieces of equipment that are normally used, paying particular attention to problems that can occur and take written notes on the readings.

2. If you have difficulty understanding the manual, provide assistance in the operating of a particular piece of equipment.

3. Have someone else who is knowledgeable provide you with assistance in the operating of a particular piece of equipment.

Criterion: When you can demonstrate adequate knowledge of the equipment or have completed the review of the technical manual for four pieces, this suggestion will have been accomplished.

To Improve Information Gathering When Problems Occur

When a problem occurs in a piece of equipment or a procedure, the first step in diagnosis is to gather information regarding the malfunction. This is critical in planning repair strategy; the completeness and accuracy of information gathering will likely be determinants of the success of further steps.

1. Since, in most cases, an equipment or procedure log already exists, provide complete information when a problem occurs. Include what happened, how, when, where, and under what conditions. Include the same information when problems occur in documents or equipment for which there is no log.

2. Discuss the problem report with your manager. The focus of the conversation should be on the completeness and accuracy of the problem report. Suggest changes/additions until this information gathering process is complete.

Criterion: When your manager is satisfied that you accurately gather information about a malfunction, this suggestion will be completed.

To Use Reference Materials More Effectively in Diagnosing Problems

In investigating the causes of equipment problems, important sources of information are the logs, service bulletins, and recent field change orders. To enable you to use these sources more efficiently in investigative work, follow this procedure.

1. Review each of the sources of information available and the specific information contained in each that is most likely to be important for diagnosing problems.

2. Prepare a brief summary of information available in each source that may be useful for problem diagnosis.

3. Review this summary with your manager to check for completeness and accuracy.

4. After solving problems that were hard to diagnose, you should consider whether consulting any of the available reference materials would have made the diagnosis job easier. If time could have been saved by using such information sources, make a note of this on a reference summary sheet.

Criterion: After following this procedure, you should be more familiar with the sources of information available and should be making more effective use of those sources in diagnosing problems.

To Further Develop Diagnostic Skills

A good diagnostician can continue to develop through increased exposure and opportunities to use skills.

1. In the next month, act as a consultant with others who are experiencing difficulty with equipment.

2. Act as a troubleshooter in cases of difficult problems.

3. Develop increased familiarity with equipment through hands-on training, the reading of technical and/or procedure manuals and other documents, as well as learning from other personnel.

Criterion: Following this suggestion will result in increased skills that will be demonstrated in the ability to handle new and more complex diagnostic problems.

To Improve the Speed and Efficiency With Which You Diagnose Problems

It is possible to be quite skilled at and familiar with all the diagnostic tests you could run and to still not be as efficient as you could be at diagnosing problems. To most quickly and efficiently diagnose problems, it is important to develop a sense of which potential causes are most likely to be responsible for the problem and which causes should be investigated only after you have checked everything else out and have a feeling for the order in which diagnostic checks/test should be done.

1. Ask your technical specialist to go through the log books and to pick out several problem descriptions (of a nonroutine nature) for each type of equipment you work with. The technical specialist should list these problem descriptions on a sheet of paper separate from the log book (so that you do not also have the problem resolution information).

2. For each problem description, list as many probable causes as you can think of.

3. Order your list of probable causes under each problem from the one most likely to be responsible for the problem to the one least likely to be responsible for the problem.

4. Under each problem description, also list the tests you would run (or the checks you would make) in the order in which you would do them.

5. Review your work with the technical specialist or someone designated by your manager as an efficient problem diagnoser. Ask this individual to look at each problem description and to discuss with you their impressions of most likely causes, causes that are less likely but still possible, and what checks or tests they would do and the order in which they would do them. Take notes during this discussion, paying particular attention to discrepancies between your lists and the more experienced individual's approach, and be sure you understand why they disagree with you.

6. Repeat this process until the technical specialist feels your lists are sufficiently in agreement with their own approach.

Criterion: When the technical specialist (or designated individual) feels that your judgments as to probable causes and tests/checks to be made have improved sufficiently, you will be diagnosing problems more quickly and more efficiently.

To Improve Your Ability to Diagnose the Causes of Problems

Being able to determine what is wrong when equipment fails is at least as important for effective performance as being skilled at repairing the problem. To improve your ability to diagnose the causes of problems, follow this procedure.

1. Ask your technical specialist to go through the log books and pick out several problem descriptions (indications) for each type of equipment you work with. The technical specialist should list these problem descriptions on a sheet of paper separate from the log book (so that you do not also have the problem resolution information).

2. For each problem description, list as many probable causes as you can think of.

3. Under each probable cause, list what you would do to determine whether this was indeed the cause of the problem; and what you would find as a result of this test or inspection if your hunch about the cause of the problem were right. (In other words, indicate what test you would run--or what you would look at--to determine whether your hunch is right. Also indicate what results you would get if your hunch were right.)

4. Review this list with your technical specialist or other co-workers skilled in problem diagnosis. Ask them to tell you whether your list of probable causes is accurate and complete (have you left out any common causes?), whether the tests or inspections are appropriate, and if the results you have listed for each test are correct (Do those results actually indicate the problem you suspect? Can they also indicate some other problem? Can you get some other results even if your suspicion is right about the cause of the problem?).

5. Take notes during this discussion and ask questions about anything you do not completely understand. Keep your list and your notes in a convenient place and review them periodically until you are familiar with them.

6. Repeat this process if your technical specialist thinks it is necessary.

Criterion: Successful completion of this development activity will make you more aware of the many different possible causes of equipment problems and of the different ways to investigate the causes. As a result, your skill at diagnosing problems and your confidence will improve.

To Improve Problem Diagnosis

In certain cases, the cause of a problem will be readily diagnosed. However, the explanation for a problem is not always so self-evident. In these situations, skill in diagnosis will be called upon.

1. Select three or four general areas in which you frequently encounter job-related problems.

2. Ask your manager or a colleague with strong diagnostic skills to give you advice on how to find the facts required to properly evaluate a problem in each of these areas.

3. Over the next 3 months, each time you are faced with diagnosing a job-related problem, follow this procedure.

   a. Find the facts required for diagnosis. Get advice again, if needed.

   b. Develop alternative problem sources. Generate a list of all possible causes of the problem. Strive to come up with at least 5 possible sources.

   c. Rank order these alternatives from most to least likely.

   d. Investigate them strictly according to their order of likelihood.

   e. When you have successfully diagnosed the problem, return to your list of alternatives and underline the actual source and the corrective action you finally took.

Criterion: As you master this exercise, the number of recorded alternatives you investigate before finally diagnosing the problem should steadily decline.

To Improve Skill At Diagnosing Complex Problems

The next time you begin work on a complex problem that is likely to involve another customer support specialist relieving you at the end of a shift (or which is likely to require calling in a technical specialist more skilled in repairing that particular type of equipment):

1. Keep complete notes on every action you take to determine what the problem is.

2. When the next customer support specialist takes over, inform them of every action you have taken.

3. After the problem has been resolved, ask this individual to provide you with the following information (either orally or in writing).

   a. What the origin of the problem turned out to be

   b. What check should be made or what test performed to uncover this problem

   c. What procedure they would have followed if they were the first individual called in

4. Compare their procedure to your notes. Ask any questions you have about discrepancies between your approach and theirs. The discrepancies between your approach and their likely approach may suggest changes in your approach that would make your approach to diagnosing problems more systematic.

5. Take notes on the preceding information and refer to those notes when confronted with similar problems in the future.

6. After 1 month has passed, repeat this process.

Criterion: If this final job results in significantly fewer discrepancies between your approach and that of the technical specialist who eventually makes the repair, then you will have successfully carried out this development suggestion.

To More Effectively Use Diagnostic Programs

Running diagnostic programs, talking to the equipment, is one of your most important diagnostic tools. To more effectively use diagnostic programs, follow this procedure.

1. Using the equipment manual as a guide, write out a diagnostic program for each piece of equipment you work with. Keep those programs in your hand manuals for quick reference.

2. Check these programs wherever possible to ensure that the program runs and mark those you have checked. When you are confronted with an equipment problem, it would be preferable to use a program you have checked--that way, if the program does not run, you know it is a result of the equipment problem and not a problem with the program itself.

3. Every time you must develop a new diagnostic program in the course of making equipment repairs, add the program to your notebook.

Criterion: When you have built up a notebook of diagnostic programs that you know work, you will more effectively use diagnostic programs to determine the cause of an equipment failure.

To Improve Problem Diagnoses in Written Work

You may be called upon to edit or make corrections in documents or in other written work. This requires analytic thinking and a critical approach as well as sufficient know-how to make the necessary corrections.

1. Review principles of English usage if this ability is required for diagnostic function.

2. Identify and demonstrate proficiency in using appropriate reference materials. If a lack of knowledge is evident in this area, conduct a review program to update knowledge.

3. Your manager will provide you with three examples of work containing a number of unspecified errors for correction for you to edit and correct.

Criterion: This suggestion will have been mastered when you can consistently produce work of high quality and can identify 90 percent of the errors in the documents containing them.

To Improve Ability in Locating Problems

Locating a problem often is facilitated by (or sometimes impossible without) the use of supplementary tools or specialized equipment.

1. In the next 2 weeks, choose two pieces of equipment and a list of potential problems that might occur in each. For each problem, list appropriate diagnostic tools and equipment that might be needed to locate the problem. Show this list to your manager for additions or corrections.

2. Your manager will provide you with training or practice in the use of any tools or test equipment you cannot effectively utilize.

3. Demonstrate that tools and test equipment are easily accessible and in good working order.

Criterion: When you can locate, identify, and demonstrate proficiency in the use of diagnostic tools for two pieces of equipment relevant to your job, this suggestion will have been mastered.

To Improve Skills in Locating Problems

The essentials of problem solving can be learned and practiced in order for you to become more proficient in diagnostic skills.

1. For the next three problems in which the cause is not immediately apparent, generate a list of possible causes and methods for checking these. Organize the list in order from the most simple to check to the most difficult.

2. Document the steps in locating a problem, including all those that resulted in blind alleys. Review this process with your manager with the aim of making it more efficient and complete.

3. Do not be misled by the obvious. Continue the diagnostic process until you are satisfied that all the problems have been detected.

4. If necessary, your manager will supplement this suggestion by having you practice on actual equipment that has been deliberately "bugged" in order to give you hands-on practice.

Criterion: When 3 problems have been accurately and efficiently located, this suggestion will have been completed.

To Learn More From Experience at Diagnosing Problems

You can learn how each piece of equipment is supposed to function and become familiar with the causes of some of the more routine problems. To develop skills beyond that, however, is largely a matter of acquiring experience with the equipment.

Unfortunately, experience is an unsystematic teacher. To help you get the greatest possible benefit from experience, a small notebook in which personal experience is documented should be maintained.

1. After every problem where the solution is not readily apparent, make a note of the symptom, the cause, and the action taken to resolve the problem.

2. After you have accumulated several of these mini-case studies, review the notes with your manager to determine:

   a. An explanation for any of the situations in which it was not clear why the problem caused those symptoms to appear, or why the action taken alleviated the problem.

   b. At least three problems that are likely to be encountered at some time or another. Record the symptoms, cause, and action required in your notebook.

3. Use this notebook as a reference whenever confronted with unusual problems on the job, comparing the symptoms encountered with those seen in the past (or heard about from others), and looking at the causes underlying those past problems as prime suspects in the current problem.

4. Continue to maintain the notebook and to discuss with others any problems not completely understood.

Criterion: If you work in this way to get the greatest possible benefit from experience, you will become more proficient at diagnosing problems in less time.

To Become More Aware of Whether Customers' Needs for Equipment Information Are Responsible for Equipment Problems

In servicing equipment, the effective customer service specialist does not stop at restoring the equipment to working order but looks for underlying causes of the problem and is alert to the possibility that a problem was caused or aggravated by improper operation or customer maintenance.

1. For each type of equipment you work on, write out a brief list of common mechanical problems that may result from, or be aggravated by, improper operation or improper customer maintenance.

2. Sit down with a more experienced customer service specialist and review this list, asking them to tell you about any such problems you have not listed.

3. Consider your major customers, the different types of equipment you work on, their repair histories, and your current feelings about the customers' general level of knowledge about each piece of equipment. Pick out any situations in which the customer could benefit from additional information about their equipment.

4. On your next contact with the customer, take steps to provide the needed information or to make arrangements for training or informing the customer's staff.

Criterion: When you become more aware of your customers' needs for additional equipment information when such needs arise, you will reduce the number of equipment problems resulting from improper operation or maintenance.

To Capitalize on Diagnostic Skills

Capitalize upon your strong skills in diagnosing problems by developing those less skilled at the same time that you increase your own technical skill and understanding of the equipment.

1. Prepare a Diagnosis of the Month case study. Use any interesting problems you have confronted or problems you have heard about that others have handled. Be sure to include, at a minimum, the following information.
   a. Type of equipment involved
   b. A list of the symptoms (those that caused the customer to call for help and those that the customer service specialist discovered while looking for the underlying cause)
   c. The source of the problem
   d. The steps taken to resolve the problem
2. Prepare your Diagnosis of the Month in written form for distribution to your co-workers.

Criterion: When you have prepared two approved Diagnosis of the Month case studies and distributed them to your co-workers you will have completed this activity.

To Capitalize Upon Strengths Through Sharing of Knowledge

A good diagnostician can be a valuable resource for others.

1. Over the next month, act as a troubleshooter or consultant for a piece of equipment or procedure that would not normally fall under your domain.
2. Train a new person or one who is unfamiliar with this apparatus or procedure in use, maintenance, and troubleshooting.
3. Share a particularly difficult or skillful diagnosis with other employees. This could be accomplished through an informal session or presented in written form for distribution.

Criterion: Sharing knowledge twice in the next month will indicate completion of this suggestion.

To Capitalize on Strong Skills In Diagnosing Problems

Capitalize upon your strong diagnosing skills by offering your services as a resource person to be consulted with, especially with knotty problems.

1. Study up on new pieces of equipment and familiarize yourself with all of the sources of information available to assist you in solving problems (that is, the written material and the people resources--make sure you know who is an expert at what). Prepare a quick reference guide for yourself, listing:
   a. The primary sources of information you will need to consult and where they can be found
   b. The other people in the organization you may wish to consult, their areas of expertise, and where they can be reached
2. With your manager review your reference guide for completeness (be sure to ask if there are any good people resources you have not included). With their input:
   a. Decide upon the ground rules underlying your resource person function--for example, your manager may wish to set a maximum limit on the amount of time you spend at such duties weekly; you will probably wish to ensure that others do not come to you with problems they should be handling on their own; etc.
   b. Devise a system for informing others of your availability as a resource person and of the ground rules.

c. Decide upon a reporting system by which you can keep track of:

   1) The number of people who consult you in a given period of time

   2) Who consults you

   3) The type of problems they bring to you

3. You are now ready for business as a resource person. Use your reporting system conscientiously and meet with your manager periodically to review these records, to discuss any problems or questions you may have (administrative or technical), and to discuss the value of the procedure in general.

Criterion: When you have served as a resource three times you will have completed this activity.

DEVELOPMENT ACTIVITIES

B. ANALYZING AND EVALUATING

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To Anticipate Potential Problems by Using Formal and Informal Communication Networks

Once you have acquired an ability to cope with problems as they occur, it is possible for you to turn more attention toward anticipating the unexpected. One of the best avenues through which you can pick up on clues regarding upcoming changes is via the communication network of the organization. If you increase your detection of the warning signals contained therein, you will be aware of and prepared for potential problems.

1. Be alert to all reliable information relevant to your area of assignment picked up in conversation with other personnel over the next few months. For instance, you might hear of a staffing problem in one of the service groups you depend on; or you might discover that the organization has signed a large contract that, although unrelated to your area, will use some of the same facilities you are using.
2. Record all potential red flag issues seen in written memos, correspondence and reports. For instance, policy changes and/or organizational shifts should always be looked at from the perspective of possible impacts on your area of responsibility.
3. Write down what you hear or read and the source. Record potential problems that could result from the recorded circumstances. Generate several possible solutions to these problems in the event that they, in fact, do occur.

Criterion: Completion of this activity should result in an increasing number of instances in which you were successful in anticipating on-the-job problems.

To Anticipate Potential Problems by Identifying Areas of Risk

It is important to identify and anticipate potential problems to ensure timely corrective action. One way in which this can be done is via the identification of risk areas in the initial stages of work planning.

Over the next 3 months each time you begin work on a project/task or assignment, institute the following procedure:

1. Prepare a breakdown of all the functional tasks involved.
2. Analyze each of these to determine any areas of risks. For example, data necessary for effective work planning might be missing. The project might involve implementing a procedure that is new. Perhaps one of the service groups upon which you rely is currently undergoing staffing problems. Try to think of everything that could go wrong.
3. Categorize these into high and low risk areas.
4. Generate several possible approaches to these problems in the event that they, in fact, do occur. Explore all potential trade-offs and alternatives in choosing the best approaches.
5. Implement safety factors into your planning for high-risk areas. For example, perhaps more time and/or funds should be allocated to these areas. If you are not working on an area identified as high risk, ensure that you are kept fully informed of all developments, either through actual observation or written reports.
6. If an identified risk does become actual, turn to your proposed strategies and determine which should be implemented. Be sure to get input from all other technical people involved before implementing the action plan.

Criterion: As you master this exercise, the number of on-the-job problems you are not prepared for will steadily decline.

To Develop Skills in Anticipating Problems

Often major problems and breakdowns can be prevented through anticipating and diagnosing, thus saving money and time lost.

1. Over the next month, choose two pieces of equipment for which problems could be anticipated to occur in the near future. Outline a diagnostic plan that could be used to prevent a major malfunction or breakdown from occurring. Ensure that the plan is of sufficient detail to be useful.
2. Review the pros and cons of the plan with your manager. If you agree that the plan is workable, implement the plan as part of organization procedure.

Criterion: Completing a diagnostic plan for one piece of equipment will fulfill this suggestion.

To Recognize Adequately Functioning Equipment

In cases other than complete failure, a familiarity with normal or optimal functioning is helpful in spotting problems when they do occur. The following suggestions will not only give you practice in recognizing the essential ingredients of normal functioning, they will also serve as a guide for future equipment operators.

1. For two pieces of equipment that are used, prepare a list of critical functions, including speed, ease of operation, and accuracy. Supplement this with a list of potential problems and/or things that have gone wrong in the past.
    a. This will be an index of optimal functioning conditions. If necessary, review this list with a knowledgeable person to determine its accuracy and completeness. Compare this with the performance specifications from the equipment manufacturer if they are available.
2. If the equipment is not functioning properly, determine causes of poor functioning.
3. If the equipment is functioning according to specifications, conduct a reassessment in a month's time to determine if operating standards are still being met.

Criterion: When you have prepared the reports described for two pieces of equipment and conducted appraisals on the same, this suggestion will have been accomplished.

To Take Preventive Action for Averting Problems

Once you have acquired an ability to cope with the day-to-day problems of your job, it is possible for you to begin turning more attention towards problem prevention. Although there are many unforeseeable circumstances that are completely out of your hands, in certain cases preventive action could be instituted.

1. Over the next month, keep a list of all problems encountered on the job, recording the cause, how they were handled, and the effect they had on job performance.
2. At the end of this period examine this list to determine which of the problems could have been prevented by action on your part. For example, the listed cause of a problem might suggest a lack of planning, a failure to attend to detail, poor communication, etc.
3. Record what is required for prevention.
4. Take action to ensure preventive actions are a part of your regular work pattern within the next 2 weeks.
5. The list of problems encountered on the job is to be maintained for an additional 1-month period.

Criterion: If you have implemented at least three preventive techniques so that the problem frequency during the second month has been reduced by 25 percent, you will have mastered this exercise.

To Avoid Problems Caused by Operator Error

Improper operating procedures can result in mechanical problems in the system. Eliminating such procedural errors can save time lost due to down time and reduce the need for costly repairs.

1. For each type of equipment operated, compile a list of common mechanical and electrical problems that may result from or be aggravated by improper operations. Include all procedures that have been used, but did not work.
2. Analyze all these procedures to determine the problem. For example, was it due to poor timing, inattention to detail, a misunderstanding about the process itself, etc.?
3. Discuss changes in the procedures that would eliminate such problems with a more experienced co-worker. Alternative procedures to circumvent each of the problems should be documented. Concentrate on eliminating one of these faults from the work, each week for a month.

Criterion: Completion of this exercise should substantially reduce the number of shutdowns due to operator error.

To Improve Assessment of the Strengths and Weaknesses of Alternative Solutions

Once you have clearly defined a problem, it is necessary to assess the strengths and weaknesses of alternative solutions so that an effective action plan can be developed. A thorough assessment of the possible alternatives requires an initial decision as to which factors to optimize in the solution and a consideration of all the constraints under which you are operating.

1. Prepare a brief written statement of the problem.
2. List all factors that should be considered in choosing the solution, such as:
   a. Controlling expenses within established budget figures
   b. Meeting scheduled deadlines
   c. Specifications
3. Rank order these factors according to their priority.
4. List all constraints (external forces) under which you are operating that might prevent certain decisions from being made.
5. Generate several possible solutions in which the highest ranking factors are optimized and all operating constraints are accepted.
6. Contact other individuals who are involved in the situation to determine which of these would most feasibly be implemented.
7. Document all assumptions on which investigated alternatives are based.
8. Put the chosen action plan into operation.
9. Document your actions.
10. Keep a record of alternatives and background assumptions so that you will have a second course of action to fall back on should the chosen course prove inoperable.
11. Record the final outcomes on each chosen action plan. Note the extent to which the factors chosen for optimization were met.

Criterion: As you improve in this area, your record should show an increasing number of instances in which the chosen solution has effectively realized the original intentions.

To Become More Flexible in Decision Making by Examining and Evaluating Past Decisions

The employee high on the coordinating factor has learned to keep an open mind even after arriving at a decision, since additional information can sometimes be very critical and make a change of decison entirely appropriate.

1. Think back over the past several months to instances where you now realize you were too rigid in sticking to your point of view once you had made up your mind.
2. List as many negative consequences as you can recall of your rigidity at these times. For example, were you unable to meet a project deadline because you had already decided that no additional personnel were needed for the project?
3. Determine if some outcomes might have been more positive had you been willing to reevaluate your decision in the light of new information.
4. Over the next month keep a record of decisions you make and the information on which you base those decisions.
5. Consider these decisions as tentative and then actively seek out additional input.
6. Revise your decisions when the new information warrants it.
7. At the end of the month compare the quality of final decisions you made prior to and during the 1-month period. Determine if your increased flexibility over the past month has had a positive impact on your decision making.

Criterion: Completion of this activity should result in feedback from others suggesting that your decisions during the past month have been of higher quality than earlier ones. This will be an indication to you that your increased flexibility has worked to your advantage.

To Improve the Quality of Chosen Solutions

When dealing with a problem, it is important to temper quick action with careful consideration. Acting too quickly may only serve to worsen the situation.

Over the next 3 months, each time a problem is encountered:

1. Record a brief statement of the problem.
2. Allot a predetermined time to list as many solutions as possible.
3. Pick the solution that sounds the most reasonable and write down the steps required to put it into action.
4. Review each step to see if any further problems would occur by adopting this solution.
5. Record all instances in which the chosen solution proved ineffective in handling the problem.

Criterion: As you improve, the average number of possible solutions listed should increase by at least one-third and the number of ineffective solutions adopted should decrease by at least one-third.

To Improve Problem Analysis

In order to successfully cope with a problem, it is essential that you first understand it. To understand it, definition is required.

1. Over the next 3 months each time you encounter a problem, prepare a written analysis of the situation. Be sure that all parts of the problem are documented. Interrelationships between these are clearly explained.

   In the process of preparing such a description of the problem, it is possible to separate the whole into more easily digestible parts. It is then much easier to analyze and understand the problem and how the various components interrelate.

Criterion: Completion of this activity should result in a marked decrease in the time required for problem definition.

To Minimize Overattention to Detail by Listing and Prioritizing the Necessary Information

It is important not to become immersed in minor details and lose sight of the important concepts of a situation.

1. Before perusing massive detail, quickly list the things that you really need to know from such materials and then make an effort to give most attention to such items and relatively little to others.
2. Seek feedback from your manager and colleagues to determine whether or not you pay excessive attention to detail. Also, begin to delegate as much of the detail work as possible unless you absolutely have to become involved in it.
3. Begin to prioritize your work, making sure you develop A, B, and C categories. Before starting a task, take a few minutes to analyze the essential ingredients needed to accomplish the task.
4. In making decisions, take about 15 minutes to gather preliminary data for the decision and then write down your tentative plan. After this procedure, continue collecting any extra data you believe necessary and make your final decision in your normal style. Compare your tentative decision with your final plan. Did the final decision justify the extra time involved? Continue this practice for at least several months and keep a running score to determine if you are spending more time than necessary in collecting all the facts.

Criterion: Completion of this activity should result in several finished projects where you have not received feedback from your manager and/or colleagues related to overattention to detail.

DEVELOPMENT ACTIVITIES

C. PROBLEM SOLVING

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To Improve Decision-Making Effectiveness by Initially Determining What, Who, How, and When

Whether you are working alone or with others, many of the decisions you make are related to achieving the goals and performing the tasks of the team. As such, you are concerned with the effectiveness of your decision making, that is, whether or not the decision will solve the problem on which you are working.

When you encounter difficulty in making a decision, follow this decision-making checklist.

1. What exactly are you trying to decide? When you are in a group, spend some time checking to see if everyone has the same interpretation of the decision the team is working on.

2. Who needs to be involved? Ask yourself who has the necessary and valid information to make the decision so that it is logically sound? Make sure that those who have to carry out the decision are involved in some way also so that they will be committed to it.

3. How should people be involved? In order to most effectively manage the involvement of people in decision making, it is useful to consider several different levels of involvement.

   a. Directly -- they actually make the decision

   b. Consulted -- they are involved before the decision is made so that they can give needed information and opinions

   c. Informed -- they are told about a decision so that it will not come as a surprise to them later on

4. When will the decision be made? Set up a timetable so people know when to expect a decision. Give one person the responsibility to manage the decision-making process.

Criterion: Completion of this activity should result in an increased number of quality decisions that will be accepted and effectively carried out by others. In the process, you will learn how to improve team decisions.

To Use Communication as a Means For Solving Your Work-Related Problems

No one is immune from problems. Do you know where to turn when you are experiencing difficulty with an assignment?

1. Take the initiative when assigned to a project and ask what should be done in a problem situation.

2. Pass this information on to co-workers who are involved. Use your judgment as to whether they should come to you or report directly elsewhere.

Criterion: When asked, you can detail the steps you would take if you experienced a problem or difficulty in your work.

To Ensure Day-to-Day Corrective Decisions Are Made Promptly

One way to prevent the growth of major problems is to ensure that all of the small day-to-day corrective decisions are made. In this way, office personnel will avoid the snowballing effect in which the failure to take heed of today's little problems results suddenly in a major confrontation.

1. Over the next month, record all day-to-day problems you encounter in your work. Record:

   a. A brief statement of the nature of the problem and the date and time on which it is noted.

   b. A few possible consequences of a failure to handle the problem at this time. (This should help underscore the importance of attending to it immediately.)

   c. The date and time it was taken care of.

2. The journal is to be reviewed at the end of this period to assess the timeliness of your actions.

Criterion: As you master this exercise, the record should show a steady decline in the time required to attend to day-to-day problems. Aim to correct all such problems within 24 hours of their occurrence.

To Cope With Mental Blocks

If you feel blocked in your attempts to solve a job-related problem, it is important that you acknowledge that you are, in fact, stuck and seek a new approach to the difficulty. Failure to do so will result in a great deal of wasted time. In addition, the ideas generated during this period will most likely suffer as a result of an overworked mind.

Select three sources within the literature on creativity that outline techniques for coping with mental blocks. Recommended readings include: The section titled "Creativity" by G. H. Broadbent, found in The Design Method (editor: S. Gregory); The Techniques of Creative Thinking by A. F. Osborn; and Creative Thinking by C. S. Whiting.

2. Outline the basic approach for three techniques contained in the selected sources.

3. Apply one of these approaches the next time you are blocked in your search for a solution to a problem. Repeat this application on successive job-related problems until each of the three selected techniques have been employed twice.

Criterion: Once you have become familiar with and employed these techniques on the job, you will have met the requirements of this exercise.

To Generate Alternative Solutions to Problems by Considering Related Effects and Constraints

In your day-to-day decision-making process, make a conscious effort to generate additional alternatives to those that seem most obvious initially.

1. To aid in developing alternatives in decision making, consider the following questions.

   a. What will happen if I do nothing about it? Some problems clear up by themselves, others call for immediate action.

   b. What principles or practices, if applied, would offer solutions to the problem?

   c. What obstacles stand in the way of a solution? Considering obstacles one by one can help yield ideas for solution.

2. Once you have developed several possible solutions, generate ideas about them. Do not limit yourself to one solution; this will limit creative thinking and cause too much concentration on detail. The availability of several solutions will make it possible to combine the best parts of them into one superior solution. Also, alternatives provide something to fall back on in case your one best solution falls through.

Criterion: Completion of this activity should result in your consistently developing alternative solutions to your decisions.

To Make Improvements in Nontechnical Areas

In addition to improving specific methods and procedures, changes can be implemented in organizational and other work-related factors.

1. Suggest ideas for change in aspects of your job functioning that go beyond the technical aspect of your work. This can have the result of increasing motivation as well as improving job functioning.

2. Choose a suggestion that has practical merit and work up the idea into a plan that can be implemented. Be sure that the plan details the anticipated results (both positive and negative) and establishes criteria for evaluation.

3. Implement and carry out the evaluation function.

Criterion: When a plan has been developed, implemented and evaluated, this suggestion will have been completed.

To Improve Troubleshooting Skills

Once a problem has been located, it is necessary to devise a strategy to remedy it. Do component parts need to be repaired or replaced? Can the problem be remedied on the spot, or will servicing need to be farmed out to someone with specialized skills or equipment?

1. For the next three problems that occur, document an attack plan to remedy the problem. Critique this plan for feasibility and comprehensiveness.

2. Organize the attack plan in flow chart form with the steps and outcomes clearly labeled. Each step should indicate through branches in the chart the next response that is contingent upon possible outcomes.

3. Check to see that the order of attack makes sense for the problem involved. Generally the best strategy is to begin with an approach that requires the least expenditure of time and materials and move gradually into solutions that are more complex and expensive.

4. Develop a list of possible causes for the problem and organize them into two hierarchies. One would be a ranking of probable cause from most likely to least likely; the other would represent a hierarchy of diagnostic ease from the most simple to the most complex. Synthesize the two to form a strategy for going about diagnosis.

5. Determine if proposed solutions represent cost consciousness. If not optimal, generate solutions that are more efficient.

6. List all the data used in making a diagnosis. With your manager, determine whether the information is accurate and complete.

7. Demonstrate safe and effective use of test equipment and diagnostic tools.

8. Your manager may provide bugged equipment for you to practice or demonstrate proficiency in this area. Consider structuring problems in order of increasing complexity and sophistication.

Criterion: When you have demonstrated proficiency in diagnosing three problems of moderate complexity, this suggestion will have been mastered.

To Cope More Effectively With Work Pressures

You may be avoiding certain activities or failing to meet some responsibilities because you find them to be stressful and difficult to cope with.

Job-related stress evokes unpleasant emotions such as anger, anxiety, and frustration that block out our capacity for coping with problems and dealing with people on a rational, thoughtful basis. Hence the maintenance of composure in the face of mental and emotional stress is of the first priority in successful job performance.

1. To help develop control in this area, keep a diary of the stress-provoking situations and/or crises you encounter over the next month.

   a. Write down the emotion you felt during the episode. Let your anger and hostility out in writing. Relax for 10 minutes. Then make a conscious effort to remove yourself emotionally from the situation.

   b. Make an objective record of what you did or said. Then try to track down the consequences of your behavior. For example, did something you said result in an escalation of hostility? What kind of reactions were exhibited by others to your comments?

   c. Make a note of what you would do differently if you had to reenact the scene, and why.

2. After you have analyzed your feelings and actions in this manner, talk to some of the other people who were involved in the situation.

   a. Ask them about your feelings regarding the situation, and how they cope with this type of stress. (If anger was expressed during the stress encounter, try to clear the air.)

3. At the end of the month, review your diary to see if the objective chronicling of your actions and the evaluation of their consequences has led to any improvement in your response to stress-provoking situations.

   a. See if you can detect a predominant coping strategy that you habitually use. Ask yourself if you could adopt a more constructive strategy.

   b. Identify the areas in your work situation where the greatest pressure and stress occur. See if there is anyway to reduce your exposure to these areas without hurting your job performance.

4. In addition you may wish to try to improve your resistance to job-related stress by practicing the following desensitization process.

   a. List five to ten important, anxiety-arousing situations.

   b. Order these situations from least stressful to most stressful.

   c. Relax in the manner that is most effective to you.

   d. Imagine yourself in the least stressful situation on your list. If you begin to feel anxious, stop and relax in the manner that is most effective for you. Then again imagine yourself in the least stressful situation on your list. (Deep, regular breathing helps many people to relax.)

e. Repeat this process during the week. When you can imagine yourself in this situation and not become anxious, you are ready to move to the next most stressful situation on your list.

f. Continue this process, until you can imagine yourself in the most stressful situation on your list without feeling anxious.

Criterion: When you have completed this process and find yourself coping more calmly and effectively with work pressures you will have accomplished this goal.

To Improve Setting of Priorities

Effective problem solving requires the appropriate setting of priorities.

1. Over the next months, whenever several problems present themselves simultaneously, take a moment to list the problems. Jot down the potential consequences of each of these problems. Rank them according to their priority. Attend to them in this sequence.
2. Present your manager or a colleague with an unordered list of these problems once the crisis is over. Ask them to number these according to their estimate of their priority.
3. Compare your lists and discuss any discrepancies. Be sure to explain your rationale for ordering the things the way you did, and make sure you completely understand the basis for your manager's or colleague's decisions, that is, pay careful attention to the factors that make one problem more urgent than another.

Criterion: Completion of this activity should result in the two lists being consistent with each other.

To Expand the Number and Complexity of Situations Where You May Utilize Problem-Solving Skills

Taking the opportunity to think on your feet rather than relying on carefully laid groundwork will give you further practice in this area.

1. Offer yourself as a last-minute replacement for committee meetings, perhaps in a leadership capacity.
2. Discuss with your manager other involvements where a great deal of prior preparation is not possible.
   a. In the early stages, ask a colleague or your manager to sit in and observe so that you may critique your performance.
   b. Tape the meeting and arrange to critique it with your manager at a later date.

Criterion: You will have met the requirements of this suggestion by utilizing your skills in two new situations over the next month.

To Increase the Opportunity to Use Problem-Solving Skills

Given your ability to respond well in crisis situations, determine if some rearrangement of your job responsibilities might allow you more opportunity to use your skills.

1. Discuss with your manager how you might better serve the organization with your ability.
   a. Seek opportunities where you might function in a troubleshooting capacity.
   b. Consider the possibility of training or coaching others to develop their skills.

Criterion: You will have met the requirements of this suggestion by assuming two or more added or different responsibilities over the next month or have trained one or more employees in responding to problem situations.

To Capitalize on Strong Problem-Solving Skills

Capitalize on expertise in this area by chairing a meeting with employees in your organization. The ideas to be generated in this session will revolve around problem solutions.

1. The next time a complex procedural or equipment problem arises, arrange a meeting of the personnel who would ordinarily be involved in the solution of the problem. This meeting can have a dual purpose. It will generate ideas on how to solve the problem at hand, but should also be a demonstration of how the skillful individual generates ideas and analyzes solutions to problems.

2. The meeting can serve as a "brainstorming" session to generate solutions for the problem at hand. Start brainstorming by:

   a. Allowing 15 minutes for members to write down ideas individually on index cards. Explain to them that the emphasis at this stage is on quantity.

   b. Read the ideas to the group one at a time. Enforce the rule that no idea is to be criticized.

   c. After all the ideas have been listed, have the group analyze the ideas and rank them according to their effectiveness.

   d. The results can then be summarized to document a new procedure for dealing with the particular problem.

3. This same brainstorming technique can be used by the individuals in the group to solve the individual problems they encounter on the job.

Criterion: The success of the session will be evidenced in the quantity and quality of the ideas which the session generates.

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D. CRISIS ACTION

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To Recognize Warning Signs of Crisis

Crisis can often be averted by being attentive to warning signals that indicate things are not as they should be.

Over the next several months:

1. Make a concerted effort to become sufficiently involved in the activities and problems of customers and team members, so that you will be able to identify warning signals that will tell you when things are not as they should be.

2. Let clients and co-workers know that they should not hesitate to come to you whenever they are experiencing problems.

3. Request progress reports from team members who report to you on a regular basis so you will know if they are having difficulty meeting their goals.

4. Maintain a record of instances in which you are able to successfully intervene in order to avert a crisis situation.

Criterion: If your attentiveness to the activities and problems of others has helped you avert at least one potential crisis, this will be an indication that this activity has been worthwhile.

To Avoid Overreacting to Crisis Situations

When a crisis occurs you avoid jumping at the first possible solution to the problem, since acting too quickly may only serve to worsen the situation.

1. Ask your manager to provide you with examples of your overreaction to crisis situations over the past several months.

2. Probe for specific examples of negative consequences of your overreaction.

3. Seek suggestions as to how you might have better responded to the crisis situation.

4. Think back to some of the crisis situations you handled relatively well over the past several months. Note in particular how the actions you took led to a positive outcome.

5. Prepare a list of "do's and don'ts" for handling crisis situations based on the information gained above.

6. Utilize these guidelines over the next 3 months to help you avoid overreacting to crisis situations that arise.

7. Keep a written record over this time period of crisis situations that arise and how you respond to them. List both the positive and negative consequences of the actions you take.

8. Review your progress at the end of the 3-month period by comparing your former and present methods of handling crisis situations. In particular, focus on the difference in outcomes or consequences to see to what extent utilizing your guidelines has helped you to make better, more rational decisions.

Criterion: If you are successfully mastering this activity, you should note a steady increase over the 3-month period in the number of instances where your response to a crisis situation leads to a positive outcome.

To Clarify the Limits of Your Responsibility

One of the factors that may prevent you from responding effectively in a crisis situation is uncertainty on your part about how much responsibility you should take.

1. Discuss with your manager the limits of your responsibility and the latitude you have in emergency situations.

2. Determine areas in which you could assume more responsibility.

3. From past experience, write a list of problems where your intervention would have been helpful and what steps could have been taken.

Criterion: You will have accomplished the objective if in the next month you respond in a problem situation where you previously would have considered any action outside the scope of your responsibility.

To Increase Flexibility in Work Planning

By adopting a flexible attitude toward work planning, you will increase your ability to handle crisis situations.

1. Prepare a contingency (what if) plan for an upcoming organizational objective.

   a. Anticipate what problems are likely to occur and how to surmount them.

   b. Check your plan for comprehensiveness. If the original needed to be discarded for some reason, could the objective be reached through the use of your plan?

2. Present your work to your manager and ask them to critique it.

Criterion: When, to the satisfaction of your manager, you have generated three contingency plans for upcoming objectives or goals, or one of your contingency plans has been implemented and proved workable, you will have accomplished this suggestion.

To Maximize Your Effectiveness in Crisis Situations by Reducing Stress

Sometimes a personal reaction to stress or becoming too emotionally involved limits one's effectiveness in a crisis situation. Sometimes reminding oneself to act calmly and rationally is enough to gain objectivity. Learn to recognize personal signs of stress and take appropriate action to overcome it or function effectively in spite of it.

1. Analyze your work situation to determine what situations cause you the greatest stress. Talk with your manager and others about their methods of coping with stressful situations of a similar nature.

2. Recognize your individual stress signs. Become attuned to your unique body messages so you may be able to control your anxiety and improve your functioning.

3. Learn a relaxation technique, such as deep breathing, to bring your tension down to a level where you can operate effectively.

4. Ask others for feedback when they notice you are becoming tense. Often they will be more aware of it than you are.

5. If the situation permits, take a few minutes to calm down before responding to the crisis.

6. Be honest with yourself and others by admitting your nervousness. When you admit the stress, you also share the load.

   a. Avoid panicking people. Saying, "It looks like we have a problem here" is quite different from shouting, "Oh my God! Look what happened!"

7. Do not let yourself panic, for you are sure to become immobilized. Remind yourself that most crises are not life-or-death situations. Remember, you can only be expected to make the best decisions that time and circumstances permit.

Criterion: When you have reduced the number of occasions where stress has prevented adequate functioning to one a week or less, you will have accomplished the objective.

To Gain Practice in Quick Thinking

A crucial component of crisis response is the ability to think and act quickly and decisively.

1. Whenever you observe a problem situation that is not within your area of responsibility, mentally assume that the problem is yours. Ask yourself what you would do in the situation.

2. Write down your response to the situation, including when you would have acted and what you would have done.

3. Document what actions were taken by others and compare this to your projected response.

4. Compare the two responses and determine if you missed important information or failed to take appropriate action. In some cases, your response might have been an improvement over the actual one taken.

Criterion: Following this suggestion will orient you to respond more quickly and with more flexibility to problem situations.

To Improve the Course of Action Taken When Confronted by a Crisis

When coping with an emergency, it is important to temper quick action with careful consideration. Acting too quickly may only serve to worsen the situation.

Over the next 2 months, each time you encounter an emergency:

1. Prepare a brief outline of the situation noting all of the constraints under which you are operating. List as many alternative courses of action as possible.

2. Pick the action plan that sounds the most reasonable and write down the steps required to put it into operation.

3. Review each step to see if any additional problems would crop up by adopting this course of action.

4. Record all instances in which the chosen action plan proved ineffective in handling the situation.

Criterion: As you improve, the average number of possible action plans listed should increase by at least one-third. The number of ineffective solutions adopted should decrease by at least one-half.

To Improve Ability to Handle Unexpected Events

Seek out opportunities to become involved in situations where you must think on your feet, rather than laying careful groundwork beforehand. These might include impromptu speeches at community gatherings on behalf of the organization. Or, if the situation arises, you might volunteer to fill in as a last-minute replacement in committee meetings, perhaps even in a leadership capacity.

1. Discuss with your manager other possibilities for involvement in situations where a great deal of prior preparation is not possible.

2. Ask a colleague or your manager to sit in on the meeting or presentation the first time you become involved in such activities. Later they can critique your performance and suggest ways by which you could further improve in this area.

Criterion: Involvement in at least three activities of this nature over the next few months will indicate completion of this suggestion.

To Better Cope With Unforeseen Problems

In your day-to-day planning and decision making, identify alternative solutions to various problems that arise. Then, if an unforeseen emergency arises and the chosen solution must be abandoned, you will be able to come up with an alternative quickly.

Over the next 3 months:

1. Identify and record 2 or 3 alternative solutions to major problems that arise on the job.

2. Refer to the alternatives you have generated if obstacles stand in the way of implementing the best solution to the problem.

3. Decide which alternative would be best in view of the time constraints of the situation and available resources.

4. Maintain a written record of instances where you apply alternative solutions to problems.

5. Note the positive and negative consequences of having applied these alternative solutions. For example, were you able to successfully get projects back on track by applying alternative solutions to problems that arose? Or, conversely, did some of the alternatives chosen only serve to worsen the situation?

Criterion: As you become better able to identify and then apply alternative solutions to problems, the number of negative consequences in your listing will steadily decrease over the 3-month period.

To Successfully Respond to a Crisis Situation

Following a predictable series of steps in a crisis situation will make your actions more effective.

1. Respond to a crisis using the following sequence.

   a. Recognize that a problem exists.

   b. Diagnose the problem for possible remedial action.

   c. Generate and choose from alternate solutions.

   d. Apply the solutions.

   e. Evaluate the situation for better solutions or ways to have prevented the crisis in the first place.

2. Apply the first four steps as an immediate response to the situation; postpone the last until the crisis is past and there is time for reflection.

3. The first thing to ask yourself in times of possible crisis is what is wrong. Later, when things have returned to normal, you can ponder why it went wrong.

4. If immediate action is called for, respond. It is usually better to offer a less-than-perfect intervention than to let matters go completely awry.

5. Be willing to go out on a limb in a crisis situation. This is not the time to sit back and let someone else handle it.

6. In times of crisis, it is important to think clearly and act swiftly. However, avoid flying off the handle. While there may be occasions when you must act alone, develop the resources to enlist the aid of a co-worker in such a situation.

7. Whenever possible, a brief discussion before acting allows you to bounce your ideas off someone else and give you a basis for evaluating your performance after the crisis has passed.

8. Offer yourself as a resource to others when they are faced with problems. Have as your goal, not only assisting them in a particular situation, but developing them into successful problem solvers.

9. Determine how quickly remedial action is needed. If there is sufficient time, generate more than one plan of action and get feedback. Try to make the most informed choice possible under the circumstances.

10. Keep a record of your response to crisis situations over the next month. Determine at what stage in the crisis response you were weak. Did you fail to recognize the problem or were you unable to provide solutions?

11. Prepare a written analysis of the potential problem and plans to prevent it.

12. Keep a crisis notebook on a departmental or team basis. Record problems when they occur; include how it was recognized and by whom, what steps were taken, and how it might be avoided in the future.

    a. Use the notebook as a basis for discussion at an organization or team meeting.

Criterion: When you have successfully completed each step in the crisis response outline for the next two problem situations, you will have achieved the objective.

To Evaluate Your Response in a Crisis Situation

1. For the next three crisis situations you encounter, ask yourself the following questions:

    a. What is wrong? How do I know something is not functioning well?

    b. How much time do I have to act? Is remedial action required within the next few seconds, or would I benefit from 5 minutes thinking about alternatives before implementing one?

    c. Is there something I can do that will buy some time?

    d. When the immediate situation is past, prepare a written evaluation of your own performance. What could I have done better? What actions would have been useful that I did not do?

    e. How can I prevent this situation from occurring again?

Criterion: Preparing written answers to each of these questions for the next three problem situations will indicate successful completion of the task.

To Document Successful Response to a Crisis Situation

Others might benefit from your example in responding to problems.

1. Write a detailed report of your response to a crisis situation that occurred in the last month.

    a. Disseminate this information in a manner that would be most useful. You might give a presentation outlining the occurrence and highlighting the crucial points in the process or prepare an article for the organization newsletter.

Criterion: Documentation and dissemination of one crisis response will indicate completion of this suggestion.

To Eliminate Potential Causes of Crisis Situations

Once you have shown yourself capable of handling crisis situations, it is possible for you to begin turning more attention toward eliminating potential causes of such emergencies.

1. Keep a list over the next few months of all crises to which you reacted. Record their causes, how they were handled, and the effect they had on your work.
2. At the end of the period, review your list. Examine the listed cause of each event to determine if there was any way in which it could have been prevented. Ask yourself if the cause of the crisis suggests a lack of planning, a failure to attend to detail, a poor communication network, etc. Generate ideas as to steps you could initiate to prevent the recurrence of each listed crisis, such as:
    a. Documentation for emergencies
    b. Back-up methods/systems
    c. Periodic checking of critical points
    d. Status reports
    e. Emergency lines
    f. Buffers in scheduling
3. Review the list with your manager or a colleague and discuss the preventive techniques you have developed. See if they can come up with additional ideas. Work out the specific details for implementing each technique.
4. Implement the preventive techniques into your work patterns.
    a. After they have become a regular part of your on-the-job routine, again keep track of the emergency situations encountered over a 1-month period.

Criterion: You will have been successful in accomplishing this goal if the same types of crises noted during the initial month are not repeated during the second recording period.

To Avoid Crises by Appropriately Responding to Change

If you are fully aware of and respond to changes that impact on your organization, you will be able to avert many potential crises.

Over the next 4 months, each time you are notified of a change--in resources, organization, policies, technology, etc.:

1. Prepare a concise statement of the nature of the change.
2. List all of its ramifications pertinent to your organization, e.g., the consequent impact on budgets, schedules, manpower, etc.
3. For each item on the list:
    a. Determine what action, if any, is required to offset potential problems.
    b. Determine the date by which this action should be completed.
4. Draw up a checklist of the required actions.
5. Cross off each completed action, recording the time at which it was accomplished.

Criterion: Once you have responded to five consecutive changes by checking off each item on your prepared action list within the appropriate time interval, you will have completed this exercise.

To Avoid Crises by Periodic Assessment

The sooner problems are foreseen and diagnosed, the more likely it will be that their effects will be contained. Consider the possibility of reassigning priorities and work duties rather than missing a deadline.

1. Conduct periodic assessments of the project or task. If it is evident that one component is lagging behind, take the steps necessary to provide additional resources in that area.
2. Sometimes constraints make such a bolstering action impossible; in that case, deadlines may need to be extended or alternative measures taken.

When planning or implementing a project that involves others, schedule periodic assessments, at least one a week, if the project is a lengthy one.

Criterion: A month without problems that could have been alleviated by assessment at the time will indicate successful performance in this area.

To Ensure That Employees Are Clear About What is Expected of Them

Employees who are clear about what is expected of them and when deadlines are to be met will help prevent crisis situations from occurring.

Have others paraphrase your directions back to you so that you may correct any misunderstandings immediately. If deadlines are involved, be certain that that information is conveyed and received.

Criterion: A month without problems occurring because others did not understand what you had told them or were not aware of deadlines will indicate that you have successfully mastered this strategy.

To Avoid Crises by Following Up Assigned Work

Remember that assigning work does not ensure its accurate and timely completion. If it is your responsibility, follow-up job assignments to monitor progress. If you maintain a helpful and cheerful attitude, your concern will be appreciated rather than resented.

1. When assigning a task or responsibility, schedule an assessment or follow-up time.
2. In the event that assigned work is not being completed satisfactorily or on time, inquire whether the employee is having difficulty and why. Keep an active concern for the individual as well as for the task requirement.

Criterion: When you have reduced the number of problems that would have been alleviated by your follow-up to one a week or less, you will have met the requirements of this suggestion.

To Avoid Crises Caused by Lack of Communication

Cooperation and openness in communication can substantially reduce the number of crisis situations. When an employee is having serious difficulty, either personal or job related, their troubles may become everyone's headache unless the problem is quickly brought into the open.

1. Do the channels exist for an employee with a problem to discuss it before their performance affects others on the project? If channels do not already exist, create them with the help of your manager, if necessary.
2. If it is within the scope of your responsibility, encourage employees to inform you if they are experiencing problems. If someone else is the project supervisor, serve as a communication link by assuming added responsibility for the project's success.

Criterion: When two-thirds of the employees who are experiencing problems relay the information to the appropriate source 75 percent of the time, this suggestion will have been implemented.

To Avoid Crises by Planning Ahead

While the ultimate goal of completely preventing crises by thorough planning may never be reached, planning ahead can minimize the number and intensity of crisis situations.

Over the next 3-month period:

1. Devote more attention to planning ahead in order to avert crises.
    a. Ensure the availability of all material resources needed to complete projects.
    b. Ensure the availability of personnel when they will be needed.
    c. Examine conflicting demands and establish priorities so that the most important work gets done first.
    d. Make sure that others have a clear understanding of these priorities and know what deadlines have to be met.

   e. Develop a few alternatives to fall back on in the event that your original plans are blocked.

2. Maintain a record over this 3-month period of instances where you are able to avoid or minimize crises through careful planning.

Criterion: If you have been successful in mastering this activity, you should notice a steady decrease over the 3-month period in the number of crisis situations that arise. If some crises do arise, you should be able to minimize them through the planning you have done.

To Minimize Crises by Planning Ahead

While the ultimate goal of completely preventing crises by thorough planning may never be reached, planning ahead can minimize the number and intensity of crisis situations.

1. Keep aware of activities and tasks that are your ultimate responsibility, even though they may be delegated elsewhere.

2. Request interim progress reports from co-workers on their part of a larger project. Supplement these by periodic follow-up on your part; schedule interim review on a temporal or partial work completion basis.

3. If it appears that resources are insufficient for an aspect of the task, alter the plan to alleviate the difficulty. If original plans must be altered, knowing this in advance helps to minimize disruptions of other functions.

4. Develop an attitude of anticipating future problems and developing contingency plans to meet them.

5. Keep a record of problems that arise over a 2-month period and actions taken on your part to alleviate them.

   a. Look for patterns in problem situations; maybe one remedial action will prevent a host of problems from recurring.

   b. Determine what actions could have been taken to lessen the problem or prevent it from happening altogether.

   c. Practice contingency planning by developing post hoc plans for the above situations.

   d. Develop contingency plans for future operations over the next 2 months.

Criterion: Successful completion of these tasks should cut the number of crisis situations in half.

To Capitalize on Strengths in Handling Crisis Situations

Capitalize on your expertise in this area by chairing a brainstorming session in your organization. The ideas to be generated in this session will deal with the topic: How to handle unforeseen emergencies.

1. Explain that the purpose of this session is to generate ideas as to how crisis situations can be effectively dealt with.

2. Allot 20 minutes for members to write down ideas individually on index cards. Explain to them that the emphasis at this stage is on quantity.

3. Read the ideas to the group one at a time. Enforce the rule that no idea is to be ridiculed.

4. Encourage the group to verbally respond with further ideas and/or refinements generated by each card that is read. Note these comments on the individual cards.

5. Summarize the results of the session by writing out in list form the generated ideas for successfully coping with emergency situations on the job.

6. Distribute this to all members involved.

Criterion: The success of the session will be evidenced in the quantity and quality of the ideas generated.

To Utilize Skills in Handling Crises

Capitalize on the skills you have developed in handling crises by offering guidance to employees as to how they might prevent crisis situations.

Over the next 3-month period:

1. Encourage co-workers to plan ahead and anticipate potential problems before they turn into crises.

2. Offer constructive advice as to what kinds of potential problems they should be attentive to.

3. Refrain from pointing the finger at employees or adopting an "I told you so" attitude if they do become involved in crisis situations. Instead, work with them to arrive at a constructive solution to the problem.

4. Monitor your success in increasing your employees' capacity for handling crises by asking them for specific examples of how the guidance you are providing them with has been applied to on-the-job situations.

Criterion: The gradual reduction of your direct involvement in employees' crisis situations will be a sign to you that they are continuing to gain confidence and skill in this area.

DEVELOPMENT ACTIVITIES

E. PROGRAM/SYSTEM MAINTENANCE

To Increase General Readiness For Resolving Customers' Problems 187

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To Solve Customers' Problems More Quickly 188

To Increase Effectiveness in Conducting On-Site Diagnoses 189

To Capitalize on Maintenance Activities 189

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To Increase General Readiness for Resolving Customers' Problems

It is important that problems identified by customers be resolved as quickly as possible. Once a problem has been reported, the more time you need to spend getting familiar with the system/product, the longer it will take you to actually begin solving the problem.

1. Increase your familiarity with all aspects of the products/systems you are responsible for maintaining. Do not wait until a problem has been reported.
   a. Read (or re-read) any operating, maintenance, or product manuals written for each product. Ask to take any pertinent training courses.
   b. As you are reading the documentation, write down questions that you can later use to test yourself on your recollection and understanding of the products. Make sure that your questions cover all the major points contained in the documentation.
   c. Ask co-workers who were involved in the design and implementation of these products to point out any unusual features and to explain any aspects of the documentation that you find difficult to understand. Write notes and test questions for yourself covering these comments.
2. Show your manager your list of test questions for each product. Decide which questions are the most critical; that is, distinguish between the things that you need to know and the things that are simply nice to know.
3. Set aside a specific time each week to test your familiarity with one of the products that you are responsible for maintaining. Rotate the products so that you test yourself on a different one each week.
   a. Drill yourself on all the questions that you wrote about this product.
   b. Go through all the questions without referring to your notes or to the documentation.
   c. Calculate and record the percent of the questions that you were able to answer fully and correctly without any assistance.
   d. Search out the answers to any questions you were unable to answer fully and correctly.

Criterion: When you can consistently answer all the critical questions pertaining to each product you will have accomplished this task. If you continue to drill yourself on your product questions during lull periods on the job, you will find that your familiarity with the products will remain fresh and you will be able to respond quickly to problems that arise.

To Increase Diagnostic Efficiency

Even when you are thoroughly familiar with a customer's product/system, it is often very difficult to determine the source of a problem or malfunction. It is possible to spend considerable time fruitlessly searching for a problem only to find, for instance, that the problem was actually caused by operator error or procedure.

1. Develop a typewritten list of all possible sources of product/system errors. Try to be both specific and comprehensive.
   a. Include transient or one-time error sources (e.g., operator mistakes or overheated components).
   b. Show your list to several co-workers and add any additional sources that they can think of.
2. Whenever you are called upon to diagnose and correct a product/system malfunction, check every item on your list to identify those that are possible sources of this particular problem.
   a. Classify all of these possible sources into one of four categories according to whether they are likely or unlikely candidates and easy or difficult to check. (Generally, you should have no more than four likely candidates.)
   b. Systematically investigate all the likely, easy-to-check sources before moving on to an extensive investigation of any of the others. Save the unlikely, difficult-to-check sources for last.

   c. Keep a record of the number of sources that you fruitlessly investigate (i.e., the sources that you rule out only after systematic investigation). Monitor this number to see whether it decreases in future diagnoses.

3. If errors that you eventually identify are not among the ones you initially classified as likely candidates, examine the criteria you are using to make this decision.

   a. Ask your manager or a co-worker with strong diagnostic skills how they would have classified the various alternatives. If they place different sources in the likely classifications, find out what criteria they are considering that you were not.

   b. Revise your own criteria accordingly when conducting future diagnoses.

4. Keep a record, in the relevant system/product manuals, of all the different problems you work on and the solutions you arrive at. When problems arise in these products/systems in the future, your notes on the previous problems/solutions will be easy to refer to and may allow faster solutions of the new problems.

Criterion: When you consistently find the actual source of product/system malfunctions among the two or three that you had initially identified as most likely, then you will have accomplished this goal.

To Solve Customers' Problems More Quickly

It is important for customer relations and for your organization's overall effectiveness that you resolve customers' problems as quickly as possible and free yourself for other tasks.

1. Determine how you can arrive more quickly at successful solutions by following these steps the next three times you are faced with diagnosing and correcting system/product malfunctions.

   a. Generate a list of all potential sources and resolutions for the malfunction; then rate the amount of confidence you have that each of these alternatives will prove to be the correct (or best) one.

   b. Record the amount of time you actually spend investigating each of these alternatives.

   c. When you have successfully resolved the problem, return to your list of alternatives and underline the actual source and the actual corrective action you finally took.

2. If these actual sources and solutions consistently turn out to be ones that you had little initial confidence in, and hence delayed investigating, then you need to improve your skill in the initial problem-analysis phase.

   a. Ask your manager or a co-worker who has strong diagnostic skills to give you advice on how to evaluate the likelihood of alternative problem sources and solutions.

   b. Prepare written guidelines, based on this advice, to follow when you are deciding upon the order in which to investigate alternative sources and solutions for future malfunctions.

   c. Follow these guidelines when investigating future malfunctions.

3. If these actual sources and solutions are ones that you had considerable initial confidence in but, nevertheless, are not ones that you investigate promptly, then you need to be more careful in assigning and following priorities for investigating alternatives. (Perhaps you are investigating the easiest ones first instead of the most likely ones.) When investigating future malfunctions:

   a. List all possible alternative solutions.

   b. Rank order these alternatives from most to least likely.

   c. Investigate them strictly according to their order of likelihood.

4. In either case, whenever you are investigating a product/system malfunction, continue to record the number of malfunctions that you investigate before finally resolving the problem.

Criterion: When the number of alternatives you investigate before finally resolving a malfunction is averaging less than half the number you took in solving the first three in these series, then you have been successful.

To Increase Effectiveness in Conducting On-Site Diagnoses

When malfunctions must be diagnosed and corrected on-site, it is particularly important to perform efficiently.

1. Identify, among the products that you are responsible for maintaining, all of those that entail equipment configurations that cannot be duplicated in-house. These are the products most likely to require on-site diagnoses.
2. Meet with your manager or a senior co-worker who worked on the development and implementation of each of these products. Find out what it is about each of these products that you should be thoroughly familiar with in order to be able to effectively diagnose and solve any problems that might arise. Be sure to include all implementation-dependent [illegible].
3. Read through the documentation on each of these products and ask questions of co-workers until you have achieved thorough familiarity with at least those aspects of the product that you had earlier defined as most critical.
    a. Set a specific time each month to review this information and refresh your memory on the critical features.
    b. In addition to maintaining this basic familiarity, strive each month to learn at least one additional thing about the product.

Criterion: As you put these suggestions into practice you will be able to conduct on-site diagnoses more quickly and with fewer calls back to the office for assistance.

To Capitalize on Maintenance Activities

When you are maintaining products/systems that were designed, implemented, tested, and documented by other persons in your organization, you are in an excellent position to provide those persons with useful feedback.

1. Whenever you discover that something about a product you are maintaining is making maintenance difficult (for example, if it is poorly designed or poorly documented), find out whether the person most responsible for developing this aspect of the product is still in your organization.
    a. If so, take the time to provide this person with direct feedback.
    b. Your feedback should be as specific, concrete, and objective as possible. That is, you should strive to convey information--not to criticize, blame, or ridicule. Also, you should be sure to talk to the person in private.
2. Do the same thing whenever you encounter an aspect of a product that facilitates maintenance. That is, be sure to give proper information about what they are doing that helps maintenance as well as information about what they are doing that makes your job more difficult.
    a. Consider making this positive feedback public. You might, for example, post in a conspicuous place the names of all developers who have done something that you would like to see others doing, along with a brief description of the desirable characteristic.

Criterion: When you find that employees are becoming more aware of the characteristics that help and hinder product maintenance and are making more effort to seek feedback from you concerning the characteristics of products they have worked on, then you will be successfully accomplishing this goal.

To Capitalize on Strong Diagnostic Skills

If all your co-workers were as effective as yourself at diagnosing the source of product/system malfunctions, the entire organization would benefit. It is important for you to capitalize upon your strong diagnostic skills by helping your co-workers to develop these same skills.

1. Develop several plans as to how you might help your co-workers become more proficient at diagnosing the source of malfunctions. For example, you might:

a. Encourage junior co-workers to apprentice under you (to work closely with you while you are involved in diagnostic activities).

c. Encourage co-workers to come to you for advice when they are involved in diagnostic activities.

2. Present these plans to your manager and reach a consensus as to which ones are most worthwhile at the current time. Work out specific procedures for implementing these plans.

3. Meet with your manager periodically to discuss your success in developing the diagnostic skills of your co-workers.

Criterion: When you can identify definite improvements in the diagnostic skills of your co-workers that seem attributable to your training efforts, you will have succeeded in capitalizing upon your own diagnostic skills.

ADMINISTRATION

A. DOCUMENTATION

- Understanding what is expected in administrative functions
- Providing information to others
- Documenting activities and information carefully and accurately
- Improving clarity, quality, and appropriateness of documentation
- Increasing efficiency at documenting

B. RECORDKEEPING

- Maintaining accurate and up-to-date records and log books
- Improving efficiency, clarity, and usefulness of records
- Organizing and maintaining a useful recordkeeping system

DEVELOPMENT ACTIVITIES

A. DOCUMENTATION

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To Ensure You Understand What is Expected of an Administrative Function

Sometimes the difficulty with accurate and complete reporting is that you are not quite sure what is expected of you.

1. Ask your manager to clarify what is required or obtain a copy of a similar report, etc., that meets established criteria.

2. Use a sample as a reference when preparing your work.

Criterion: When you can successfully point to examples of good performance on the majority of your routine administrative functions, you will have met the requirements of this suggestion.

To Avoid Losing Track of Complex Administrative Functions

Sometimes administrative functions composed of component parts are not carried out adequately because they require the work of more than one person or take a long amount of time. You can avoid losing track of these tasks by completing the following suggestions.

1. When it is your responsibility to do so, follow a document or procedure after it has left your work area.
   a. Schedule the points at which you must follow-up before the work leaves your domain.

2. When an administrative function requires a series of tasks, prepare an outline of those tasks.
   a. Identify the last task necessary for completion so that you will know when to stop worrying about whether it is finished.

Criterion: A month free of feedback that a complex task that is your responsibility was incomplete or poorly executed will indicate that you have followed this suggestion.

To Capitalize Upon Strong Administrative and Planning Skills

The ultimate objective of efficient administration and coordination is, of course, to keep the customer satisfied at the lowest possible cost to the organization. Therefore, the customers themselves are your most valuable indicators of trouble in your system.

1. Over the next month, chart the frequency and duration of indicators such as:
   a. Callbacks
   b. Customer complaints
   c. Emergency calls
   d. Equipment removals
   e. Calls that necessitated bringing in someone other than the usual customer service specialist, noting the particular customers and customer service specialist involved

2. At the end of the month, examine the pattern of these problems. Determine whether these indicators point to the need for such things as greater attention on a regular basis to particular customers (more maintenance calls); greater attention on a regular basis to a particular type of equipment; more technical specialists assigned to a particular area; expanding the expertise of a particular customer service specialist--or arranging to have someone with the necessary skills take on some of that individual's duties; or perhaps giving some service specialist a pep talk; etc. Write out your recommendations for alleviating these problems.

3. Meet with your manager to review your charted indicators, any patterns you have uncovered, and to discuss your recommendations. Take steps to implement whatever actions you and your manager decide upon.

4. Continue your charting activities for the next month, being sure to note the dates of any actions you took. At the end of this month:
   a. Examine the pattern of the frequency and duration of the indicators for the past month to determine whether any action is called for on your part.
   b. Compare this month's chart with last month's chart to determine the effect of any changes made.
   c. Look at the 2 months to determine if any other patterns become apparent.
   d. Write a brief report of your findings in a, b, and c and of any recommendations you may have.

5. Submit this report to your manager.

Criterion: When the number of customer complaints and calls necessitating the consulting of other customer service specialists has been reduced, you will have completed this activity.

To Avoid Missing Important Information in Memos and Reports

It is easy to get caught up in unnecessary detail if you are not clear on what you need to know.

1. Acquire the habit of underlining important information in memos and reports you receive.
2. Before reading a report or memo, list the things you really need to know from such material.

Criterion: When you are satisfied that you have not missed or misunderstood information in reports or memos, you will have mastered this task.

To Provide Higher Quality Information

When others ask you to provide them with information, it is your responsibility to ensure that the information is complete and reliable. If the information you provide is faulty and/or leaves out pertinent details, there will be repercussions in the work of others that will ultimately lead to a lack of trust in your capacity to provide support. In order to enhance your credibility in the eyes of your manager, co-workers, customers, try following these steps each time you are asked to provide information.

1. Always begin by getting a clear definition of what is required.
   a. Have a pad of paper readily available to make notes during the request. Do not rely on your memory.
   b. If you have some questions as to what exactly is wanted, ask it. Trying to save face by covering up confusion is a tactic that rarely succeeds over the long run. Also, if you are concerned about how to go about obtaining the information, review the procedure with the other person.
2. Make sure the information you obtain is reliable.
   a. If you are looking up figures, dates, etc. in a written source, always double check your entries against the source material.
   b. If you are obtaining information over the phone, make it a standard practice to restate to the source the information you have written down to ensure that you have heard correctly.
   c. Go to "the horse's mouth" whenever possible. Secondhand information has a much higher chance of containing errors.
3. Once you have finished work on the request, but before you present the information to anyone, check your original notes on the request to make sure you have done all that was required.
   a. Spend a little time organizing the data so that you can present it in a coherent fashion. For example, you might want to make an outline of the key queries with information clarifying these.
4. Follow this basic procedure closely over the next month. Keep a record of the co-workers whom you provided with information
   a. At the end of the month, ask these co-workers for feedback concerning the information that you have provided them over this period. Specifically, ask about the adequacy, accuracy, and clarity of the information.

Criterion: If the feedback you get is uniformly positive--if your co-workers have been fully satisfied with the quality of the information you have given them--you will have successfully completed this task. If you continue to provide this quality of information, you will likely find that others are attaching more credibility to the things you say and, in general, are willing to put more trust in you.

To Provide Nonroutine Information to Others More Promptly

An important element of effective work oriented communication is providing information to others in a timely fashion.

1. For the next 2 weeks, make a note of every nonroutine piece of information that you must communicate to someone else.

2. Note the date and time at which it became apparent that such communication was necessary.

3. Record the date and time by when the information should be conveyed to the other individual.

4. Note the date and time when you actually do convey the information.

Criterion: When your notes indicate that you have met your self-imposed deadline 90 percent of the time for 1 week, you will have successfully completed this development activity.

To Make Important Information Available to Others

If you were promoted tomorrow, how much important information would go with you? Determine what information could and should be available in written form for others.

1. Take a critical look at your job duties and actions. Determine what things and methods would be useful for others to know.

2. Begin a notebook to document information about your job. Add information to this notebook every week for a period of 2 months.

3. Organize the entries into categories that make sense for your job responsibilities.

Criterion: Carrying out this suggestion will give you a clearer picture of your job responsibilities as well as provide useful information for your co-workers and possible successor.

To Capitalize on Strengths in Administration by Assisting Colleagues in Improving Their Administrative Skills

Capitalize on your strengths in administration by helping colleagues improve their skills in this same area so that they can perform their own jobs more smoothly and efficiently.

1. Meet with colleagues who are having difficulty processing paperwork to share your ideas regarding handling of administrative tasks.

2. Focus on administrative areas in which you have noted one or more weaknesses within your organization. Topics for discussion might include:

   a. Determining what to document

   b. Organizing records

   c. Cutting down on amount of time needed to process paperwork

   d. Maintaining accurate and up-to-date records

   e. Avoiding errors in documentation

   f. Attending to important details in paperwork

   g. Maintaining ready access to documents and records

   h. Using previously documented information in problem solving and decision making

3. Encourage colleagues to develop their own ideas for improved handling of administrative tasks within their own area.

4. Over the next few months note to what extent your colleagues are utilizing the suggestions you offered during the discussion.

Criterion: Completion of this activity should result in your colleagues consistently utilizing several of your suggestions.

To Reduce Amount of Time Necessary to Process Paperwork by Prioritizing and Scheduling

While the paperwork aspects of your job are vitally important, handling paperwork often feels like an unproductive use of one's time. Fortunately, there are ways to cut down on the amount of time needed to devote to these aspects of the job and to leave you with more time to devote to other important tasks.

1. Determine what proportion of your time during a typical workweek is devoted to processing of paperwork.

2. Separate your paperwork into categories according to the manner in which you ordinarily process it. For example:

   a. Paperwork to be completed on-the-spot (e.g., when something needs to be documented immediately upon its occurrence).

   b. Paperwork to be completed by the end of each day.

   c. Paperwork to be completed by the end of each week.

   d. Paperwork of low priority that has no specific deadline (if applicable).

3. Determine how your paperwork tasks are related to each other. Decide if some of them could be grouped together and done consecutively rather than at scattered points during the day or week. By grouping related tasks together, it is likely that you will cut down on the amount of time you devote overall to processing of paperwork. For example, if you must prepare two reports by the end of the day that contain similar information, plan to do these two reports consecutively. This can be more timesaving than preparing one report, then setting the information aside for several hours, and then returning to prepare a second similar report. The latter approach requires that you spend time relocating the information and getting yourself into the proper frame of mind, both of which makes you less efficient in carrying out your paperwork.

4. Follow this schedule over the next 2 months in processing your paperwork.

Criterion: Review your progress at the end of the 2-month period. At the end of that time, compare the proportion of total time you spend in processing paperwork with the proportion of time you typically spent prior to the 2-month period. If you are becoming more efficient in handling your paperwork and your paperwork load has not increased, you should find that the proportion of your total time devoted to such activities should have been reduced by approximately 10 percent.

To More Carefully Document Inquiries

By carefully documenting inquiries you receive from individuals inside and outside the organization and by filing records of these inquiries in an easily accessible place, you will be able to provide prompt information to others when they request it and also avoid needless duplication of effort.

1. Document carefully each inquiry you receive over the next 2 months.

2. Specify the exact nature of the inquiry as well as all pertinent information on the caller, such as name, organization, address, etc.

3. Seek an immediate response to the inquiry if you are not able to answer the individual's inquiry.

4. Mark a follow-up date on your calendar to get back with the individual regarding their inquiry if the information is not readily available to you.

5. Maintain files of inquiries according to subject or product. In this way, you can refer to the files and perhaps find the suitable response to a particular individual's inquiry without having to go to someone else for the answer.

Criterion: Review your progress at the end of the 2-month period. If you have conscientiously followed all steps in the above suggestion, feedback you receive from others should indicate that they find your method of documenting and filing inquiries more useful to them than previously. You should notice more instances where you have been able to respond more quickly to others' inquiries because you can refer to similar information on file.

To Become More Attentive to Detail in Documentation

Often you are so familiar with a subject or a project on which you have worked that it is easy to omit important details in documenting it or to assume too much prior knowledge on the part of future readers of the documentation. Thus, it is important that you prepare doucmentation not only from your own perspective but also with a view towards how your manner of documentation will impact other individuals who will make use of the information in the future.

1. Ask your manager and co-workers to give you specific feedback over the next 3-week period regarding the amount and appropriateness of detail you have included in documents or reports circulated to them. Ask them to make a note of any important details they feel are missing from the documentation.

2. Review the comments that have been made by these individuals. Is there any particular type of information that you tend to omit but other people think is important?

3. Write up some general guidelines for yourself on the basis of the preceding analysis. Use these guidelines to decide what kind of information should be included in future documentation.

4. Continue to seek feedback from these individuals during the subsequent 3 weeks on your attentiveness to important details in documentation. If necessary, revise the guidelines you have established for yourself.

Criterion: Review your progress at the end of this second 3-week period. If you are becoming more attentive to details in your documentation and report writing, the number of comments related to your inattention to detail should be steadily decreasing.

To Improve Accuracy of Documentation

Accurate and timely documentation is essential to the overall effectiveness and efficiency of the organization.

1. Your manager will point out several examples of your past documentation that were not up to par for one reason or another. Factors such as legibility, clarity, sufficiency of detail, and timeliness should be rated to determine where the weaknesses lie.
2. Revise past documentation that needed improvement, and the revised documentation is again to be rated. This procedure is to be repeated until all factors are rated as being adequate.
3. To guard against back sliding, your manager will review a sample of your documentation 1 month later to ensure the standards are being maintained.

Criterion: This suggestion will have been completed if all factors of your documentation are rated as being adequate 1 month after the initial rating.

To Increase Attention to Detail in Paperwork

In order to be an effective administrator, you must pay close attention to important details in the paperwork you process. Failure to do so will result in actions based on incomplete information.

1. Over the next 2 months, each time you process documents:
   a. Glance through each piece of paperwork quickly to get an initial understanding of its contents and impact.
   b. Order the documents according to their priority.
   c. Re-read each item thoroughly.
   d. Underline each point in the document that is important for you to be aware of and/or will influence future actions.
   e. Note in the margin references to any other documents that contain information relevant to this particular piece of paperwork.
   f. If you take action based on this document, refer to the underscored points and any noted references to additional documents to ensure action is based on a complete understanding of all factors.
   g. File the document appropriately.

Criterion: If you are successful, the number of times actions are taken that fail to take into consideration all of the important details contained in the documents you process will substantially decline.

To Document All Key Details of Tests

Failing to document all pertinent test data significantly reduces the usefulness of these test documents to yourself and others when they need to be referred to at a later date.

Use the following procedure each time you document test data over the next 1-month period.

1. Note the surrounding conditions under which the test was performed.
2. Explain any symbols or notations that could be misinterpreted by future readers of your documentation.
3. Include a small freehand sketch of the test set-up.
4. Record all key details of the test. Your determination of the key details should be done from the perspective of future readers of the documentation. That is, what details are they going to want and need?
5. Seek specific feedback from your manager over the next month on the quality of important test documents you prepare during that time.

Criterion: Review your progress at the end of this 1-month period. If you have been successful in mastering this suggestion, you should find that any negative comments about the way you prepare test documentation will be gradually diminishing.

To Improve Documentation in the Form of Records and Logs

Often the usefulness of work is determined by the accuracy and care taken in documenting the results.

1. Have your manager conduct a review of your recordkeeping for a given week. The manager will critique the results for accuracy, thoroughness and general usefulness and communicate this to you through written comments or oral communication. A follow-up evaluation will be conducted 1-month later.
2. Ask your manager to provide a sample of work to function as standards for good performance.
3. Keep a file of your work so your manager may periodically evaluate your performance.

Criterion: Following this suggestion should result in a significant reduction of errors and an increase in the usefulness of recordkeeping activities at the follow-up evaluation.

To Improve Documentation by Better Access to Information

The quality of documentation is limited by the information upon which it is constructed.

1. Within the next 2 weeks, identify in written form the sources of information that are used to construct documents and reports. This should include a paragraph or two as to what use is made of the information.
2. Review this list with your manager to determine whether documentation could be improved through the use of new sources or better use of existing sources.
3. Cooperatively, design a development plan to implement the preceding suggestion. Set a target date of 1 month to accomplish the plan and conduct a review at that time.

Criterion: Implementing this suggestion should result in significant improvement in the quality of documentation at the review.

To Improve Documentation Through Increased Know-How

Sometimes it is the case that usefulness of written work can be improved through increased knowledge.

1. With your manager identify areas where increased knowledge would enhance your documentation skills. Use examples of written work as a guide for selecting areas for improving knowledge.
2. Working with your manager cooperatively, design a development plan to accomplish your goals.
3. Attend a seminar or course that is designed to improve skills relative to this area.
4. Have a reevaluation when the development plan is completed.

Criterion: Significant improvement at the reevaluation should result from following this suggestion.

To Improve the Clarity of Your Documents by Using Straight Forward, Understandable Language

The usefulness of your documents is a direct function of their clarity.

1. Make your documents legible and straightforward by avoiding abbreviations or idiosyncratic terminology.
   a. Put yourself in the place of others who may later have access to the document.
   b. Determine whether they will be able to understand its contents without explanation from you.
   c. Check to see that the information contained is accurate and complete.
2. Double check all documents for clarity. If you are in doubt, have your manager look at it.

Criterion: A month free from feedback to the effect that your documents are not understandable indicates completion of this suggestion.

2

To Improve Clarity of Documentation

It is important that documentation be clearly written since you may not always be available when other people need to refer to information that has been documented.

Follow these steps each time a written documentation is prepared over the next 3-week period.

1. Make a complete list of facts and details to be included in documentation.
2. Try to determine how future readers will make use of this documentation, and then ask whether all the necessary information is listed. Eliminate any items that will not be important to future readers.
3. Organize the items in outline form so that the order in which they will be presented has a rationale and is coherent. Once the items are organized in this manner, ask again whether anything is missing or whether anything could be omitted.
4. Keep an image of the future readers of the information you are documenting. Choose words and expressions that these people will understand. Remember that the simplest way of saying something is generally the best way.
5. Ask a skilled writer in your department to read and critique the documentation and to give feedback concerning its clarity. Alternatively, ask the receiver of the communication if the documentation is understandable and if its meaning is clear. With the input of the other individual, determine what has to be changed to improve the clarity. Keep a notebook to record all the criticisms, suggestions, and advice received. Also, make note of anything about efforts in this area that others praise so that the strengths can be built upon in the future. Review these notes before preparing new documentation. Aim to make at least one noticeable improvement in clarity every time something is written.

Criterion: At the end of the 3-week period, compare your most recent documentation to documentation written prior to this period. The most recent documentation should be noticeably clearer than earlier instances of documentation if this suggestion has been successfully mastered.

To Improve Quality Through Better Tools and Procedures

The quality of documentation, particularly drawing or other graphic representations, is a function, in part, of the implements used in their construction.

1. Identify instruments that would improve the quality of documents and drawings. If they are not readily available, steps should be taken to correct this problem.
2. If you are not familiar with the use of instruments or would benefit from increased training, obtain practice materials to help gain proficiency.

Criterion: Following this suggestion should result in increased usefulness and appropriateness of documentation.

To Improve Appropriateness of Information Included in Documentation

Two common pitfalls in documenting are providing too little information and providing too much. Often you are so familiar with the product/system you have worked on that it is difficult to decide which facts are going to be important to someone who is less familiar with it. To improve your skill in deciding what facts to include in documentation, try following these steps.

1. Review the comments you received and the corrections you had to make on all pieces of documentation that you wrote in the past few months. (If this documentation was not reviewed, give copies to your manager or a senior co-worker and ask them to pencil out anything that is unnecessary to the documentation and to make a note of any important details that are missing.)
   a. Look for consistencies among these comments and corrections. Is there any particular type of irrelevant information that you tend to include? Is there any particular type of information that you tend to omit but other people think is important?
2. The next five times that you submit documentation for review, keep a record of any feedback concerning the presence of unnecessary details and/or the absence of details that might prove to be important.

   a. By re-reading these notes periodically you should be able to avoid repeating the same types of errors when you are deciding what details to include in future documentation.

3. Meet with your manager or project leader to discuss the improvements they have noticed in the information content of your documentation.

   a. Ask them to review the notes you have written for yourself and to suggest possible refinements.

   b. Continue to refer to these notes whenever you write documentation to ensure that you continue to improve your ability to include exactly the information necessary, no more and no less.

Criterion: When reviewers' criticisms of the information content of your documentation reveal that you are no longer making the type of consistent errors that you were making before you began this task, you will have taken a significant step towards achievement of this goal and may consider this task successfully completed.

To Improve the Usefulness of Documents by Sharing Ideas

It is often useful to periodically evaluate the process of recording information for the organization or team as a whole. This activity will ensure that the procedures used best fit current needs.

1. Meet with your manager and/or co-workers to discuss ways of improving the information, transmission, and retrieval system. Solicit their input on changes that could be made, and design plans to implement changes that are deemed worthy and practical.

2. Use this meeting to review acceptable standards of performance and provide examples of quality work.

3. Suggest ways in which paperwork could be reduced while maintaining or improving the current level of documentation.

4. Streamline a organizational procedure so that documentation becomes more efficient and more useful.

Criterion: Following this suggestion will result in increased usefulness of record-keeping procedures.

To Improve at Meeting Documentation Standards

If you can reduce the amount of revision you have to do following reviews of your documentation, you will be able to reduce the later deadline pressures on yourself and other project members. For these reasons, and, perhaps, to reduce the number of blows to your ego that you suffer during the reviews of your documentation, it is important to improve the extent to which your preliminary versions meet the documentation standards laid out in your organization.

1. Reread all the reference standards against which your documentation is being evaluated. Spend some time discussing these standards with your manager, your project leader, or a senior co-worker. Strive to become fully familiar with them.

2. Apply these standards rigorously and conscientiously in evaluating your documentation as you are writing it and, certainly, before you submit it for review. Strive to reduce the number of inadequacies that are present for others to find.

3. Keep an ongoing written record of all the inadequacies detected, all the specific corrections required, by the persons who reviewed your documentation.

   a. By analyzing these records, you should be able to identify the documentation standards that you are not applying consistently and/or do not fully understand. You can take appropriate corrective actions.

4. Read over your records before you begin to write any future documentation. Then, while you are writing the documentation, be on the alert for a recurrence of similar inadequacies. Strive to avoid having anything reappear in your records.

5. Develop the habit of periodically reviewing important documentation standards so that you will become aware of all updates and revisions of these standards.

Criterion: As you improve at meeting documentation standards you will find that fewer corrections are being suggested by review panels and that you are spending less time on revisions of your preliminary versions.

To Increase Amount of Documentation and Commenting Completed During Coding Of Computer Programs

When you are responsible for writing documentation (for example, internal Maintenance Specifications) to be contained in your source code as comments, you are most likely to do a thorough job if you document your code as you are writing it instead of waiting until afterwards. Also, because the act of documentation will often force you to examine the basic workings of your modules again, it is a useful debugging technique during the development phase. Most experienced programmers/analysts strongly believe that documentation should be completed during coding, not afterwards.

1. For the next month document and add comments to all your code as you write.
   a. In a notebook reserved for this purpose, keep track of all the "bugs", weaknesses, inadequacies, and redundancies you discover in your module as you are writing the comments.
2. Ask your manager and several senior co-workers to describe the benefits they have found to be associated with documenting and adding comments to code as they write it.
   a. Add this list of benefits to your notebook.
   b. If your manager or senior co-workers have encountered any situations in which it definitely was not advantageous to add comments while coding, write summary descriptions of these unusual situations into your notebook.
3. Whenever you find yourself avoiding or postponing the dreary job of documenting, review your notebook.
   a. Check to see whether you are in one of the unusual situations where adding comments while coding is not advantageous. If so, you can perhaps feel justified in postponing the documentation.
   b. Reread the list of benefits and the listing of all the bugs, weaknesses, and so forth that documenting allowed you to overcome while you were coding during the first month on this task.
   c. This should rekindle your enthusiasm and help you to stop postponing documenting while coding.

Criterion: When you rarely find yourself avoiding or postponing the documentation of your programming code, you will have accomplished this goal.

To Improve Efficiency in Gathering Information

Excessive time spent searching for background information to resolve problems can result in decreased efficiency in handling work. Therefore, a lack of knowledge of source documents can reduce your efficiency. During the next month:

1. Identify the information most often needed to complete work on the job, but that is not readily available.
2. Make a list of the most accessible sources for the information identified in the first step. Organize this list by the tasks involved so that the list can be used as an easy reference. This will eliminate the searching previously required to find the information.

Criterion: When you have identified sources for the information most frequently needed on the job, the requirements of this suggestion will have been completed.

To Increase Efficiency at Documenting

Documentation is a critical but often time-consuming portion of your work. Because it demands less creativity than most other tasks, it may seem boring or unrewarding. For all these reasons, efficiency at documenting (striking an optimum balance of speed and quality) is highly desirable.

1. Copy from existing documentation whenever possible.
   a. If a well-written piece of documentation already exists for a topic you are covering, use it.
   b. If you repeatedly cover some similar topic areas in your documentation, keep a reference file containing sample versions of these peices. Also keep copies of pieces of documentation that have been particularly difficult or time-consuming for you to write. When you need to write a piece of documentation similar to one you have written in the past, modify your sample of the previous piece instead of starting from scratch.

2. Make full use of the automated systems available as aids to documentation writing.
    a. Be sure you are familiar with all the automated methods that can be used to reduce errors and increase format consistency.
    b. Talk with your co-workers to find out whether they are using these automated systems in ways that you have not. Try these approaches.
3. When someone else does the typing or keypunching of your documentation, misunderstandings and errors may be occurring at that phase. If so, talk with that person to work out a system for avoiding or catching these errors. Check back with that person occasionally to learn what additional suggestions they might have for you.

Criterion: As you put these suggestions into practice you will find that you are completing your documentation more quickly while maintaining, and perhaps even increasing the quality of the final product.

To Utilize Good Documentation Skills by Evaluating Procedures for the Organization as a Whole

An employee who is particularly adept can facilitate the operation of the organization by evaluating the process of recording information for the organization as a whole. This will give you valuable experience and ensure that the procedures used in the organization best fit current needs.

1. Meet with organization personnel as a group to discuss ways of improving the information transmission and retrieval system. Input concerning changes that could be made and design plans to implement changes that are deemed worthy and practical should be solicited.
2. With the information gleaned from this meeting, design a plan for streamlining organizational procedures so that documentation becomes more efficient and useful. The plan can then be submitted to your manager for evaluation. Any suggestions deemed workable can be implemented for the organization as a whole.

Criterion: Implementation of one suggestion to streamline procedures will fulfill the requirments of this suggestion.

To Capitalize Upon Good Documentation Skills

The employee who is proficient in this area can further improve their skills by pursuing new applications and sharing knowledge with others.

1. Attend a course or seminar designed to teach new skills or further improve existing ones. Arrange to share the knowledge gained with other employees.
2. Assist in the training of a new employee or improving the skills of one who is experiencing difficulty in this area.
3. Provide ideas for improvements in the way actions are documented at the team or organization level.
4. Review documents and records of others and offer suggestions for improvement.
5. Your manager should provide opportunities for you to use your skills in new and challenging applications.

Criterion: Following these suggestions will result in further improvement of skills and increase your contribution to the organization as a whole.

To Capitalize on Strengths in Documentation

Your own skills in writing clear, concise documentation probably make you conscious of the flaws in documentation written by other people. Capitalize on your skills and sensitivity by developing a list of "do's and don'ts" in documentation writing that goes beyond the organizational standards. Your manager can then make your list available to guide others in the organization.

1. Start a notebook to record your observations and ideas about documentation writing.
    a. In one section of your notebook, jot down any examples of ambiguous, wordy, incomplete, or otherwise poorly written portions of documentation that you come across in your work.
    b. In another section of your notebook, jot down contrasting, positive examples: well-written portions of documentations that you have encountered. Also, collect copies of any pieces of documentation that you consider particularly well-written.

c. In a third section, write down any general guidelines that you follow in your own writing or that you have been able to abstract from these specific examples of "do's and don'ts" recorded in the other section. Include any suggestions or rules you think will help others improve their skills in writing documentation.

2. When your notebook has progressed to a point where you think it can be helpful to your co-workers, review it with your manager.

a. Reach agreement as to the final format for the guidelines and the means through which they should be made available to your co-workers. Even after others begin to refer to your guidelines, continue to keep them up-to-date and consider asking your co-workers to submit their favorite "do's and don'ts" of documentation writing.

Criterion: When you sincerely believe that your collection of examples and guidelines has helped to improve the documentation writing skills of some of your co-workers, you will have been successful in accomplishing this goal.

DEVELOPMENT ACTIVITIES

B. RECORDKEEPING

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To Maintain Accurate and Up-To-Date Records

Properly documenting actions and decisions and maintaining files of important information is essential for the smooth, efficient functioning of the organization.

1. Think back over the past several months to situations where you were unable to provide information requested by individuals because you had failed to properly document previous actions or decisions.
2. Make a list of all negative consequences of your inability to provide the requested information. For example, were individuals delayed in their work because they had to spend time seeking the information elsewhere? Was there needless duplication of effort? Did they rely on outdated, erroneous information from the files in problem solving and decision making because updated, more accurate information was not on file?
3. Determine how these problems could have been avoided. For example, should you have documented actions sooner? Should you have reviewed the files periodically to discard outdated, useless material?
4. Develop a specific plan to overcome any deficiencies in documentation and recordkeeping that emerge in the above list.
5. Follow this plan over the next 3 months.

Criterion: If your plan is serving its purpose, you should notice over the 3-month period a steady decrease in the number of instances where you are unable to provide information to individuals when they request it and in the number of instances where mistakes are made because of reliance on outdated information from the files.

To Maintain Up-To-Date Records on Human and Technical Factors

It is important that you have a clear understanding of the kinds of human and technical factors that need to be documented. Not only will proper documentation assist you in planning and decision making, but the information documented may later be required by your manager and other individuals in the organization.

Over the next month:

1. Update employees' personnel files to include the most recent information related to their developmental needs, training, and special work assignments.
2. Maintain records of all performance reviews and meetings and copies of employees' progress reports.
3. Update documents related to technical factors within your organization. This should include information on procedures, skills, training, tools, work place, and machinery.
4. Seek guidance from your manager on additional personnel and technical information that should be documented.
5. Together, determine if any of the information in the files is no longer useful and can thus be discarded.
6. Make every effort over the subsequent 3-month period to document all necessary information.

Criterion: If you are properly documenting personnel and technical factors, you should find by the end of the 3-month period that the information documented can more often be used in your planning and decision making than was true in the past.

To Maintain Accurate and Up-To-Date Log Books

By maintaining accurate and up-to-date log books, you will later have ready access to information that you and/or others want and need. The log books will also prove to be useful sources of information to others in your absence.

1. Seek guidance from your manager or an experienced co-worker if you are unsure as to the amount and type of information to be included in your log books.
2. Organize your log books in a system that will be useful to yourself and others. That is, instead of maintaining only one log book for all the activities in which you are engaged, maintain several log books, simultaneously, according to subject matter or project.

3. Review information in log books for completeness; is subject matter adequately identified; is the objective of a given entry or set of entries called out; are graphs and pictures properly identified and scales and scale factors marked; are results and conclusions spelled out; can other people understand the entries? As a check on yourself, have your manager or a co-worker examine the log book for clarity and completeness and to suggest how the information documented could be improved.

4. Include a table of contents on the first page of each log book. This should consist of a list of all information included in the log book and the corresponding page numbers where this information is found. Continue to update this table of contents each time you add new information to your log book.

5. Write an explanation of the symbols and notations you make use of in each log book. Since some symbols may be interpreted in more than one way, this will prevent the possibility of misunderstanding by individuals who refer to the information in your log books in your absence.

Criterion: If you are becoming better at maintaining accurate/well-organized, and up-to-date log books, instances of misunderstanding by others should be steadily decreasing. You will also be more rapidly able to locate important information when others request it.

To Avoid Errors by Recording Information Immediately

It is important to document information quickly so that records are not erroneous or incomplete.

Over the next month:

1. Write things down when they happen rather than trusting them to memory.

2. Allocate time each day to complete records.

Criterion: Completion of this activity should result in feedback from others that indicates that any errors in documentation have been virtually eliminated.

To Handle Paperwork More Promptly and Thoroughly

Effective recordkeeping maximizes the efficiency of the entire work unit; and it is important to document information quickly so that records are not erroneous or incomplete.

1. Discuss with your manager each of your various paperwork responsibilities. Review and take notes on:

   a. The primary purpose of each

   b. The other people who make use of your reports and notes

   c. The amount and type of information to be included in each

   d. The approximate amount of time one should spend on each

   e. The specific time of day one should allot to each (e.g., some paperwork is most efficiently completed immediately following each service call; some might be completed at the end of each day; while some might be appropriately left for "slow periods").

2. Prepare your own daily and weekly paperwork schedule, setting aside specific times for attending to specific paperwork responsibilities.

3. At the end of every day, record the number of times you met your schedule and completed a paperwork duty by the scheduled time; and how late you were. (For all paperwork completed that day that was completed after the scheduled time, add up the total amount of time, in hours or days, elapsed between the scheduled completion time and the actual completion time.)

Criterion: When you have followed this procedure for at least 2 weeks and have come within 1 hour of meeting your schedule for 5 consecutive days, you will have accomplished your goal.

To Improve Recordkeeping Through Attention to Time Factors

Too often paperwork gets relegated to the last few minutes and the result is work of poor quality. For written work to meet standards, sufficient time must be allotted. Delaying the recordkeeping process can result in reporting that is incorrect or of limited usefulness.

1. Keep a list of written work for the next 2 weeks. Note when the activity that is documented took place and how long was allowed for the documentation process. Continue this process for a second 2-week period.

2. Determine whether sufficient time has been allotted to written work and decide what restructuring of the workday is necessary to accommodate this activity.

3. Set standards for documentation of work function and realistic goals for completion of written work.

Criterion: Following this suggestion should result in written work of increased quality and reduction in the time lag between activity and documentation.

To Improve Recordkeeping Efficiency, Clarity, and Usefulness

Keeping accurate and useful records is vital to your overall effectiveness and to the efficiency of the entire work unit.

1. Ask your manager to point out five examples of your past recordkeeping that are not up to par.

2. Ask your manager to rate each of the examples by filling out this grid.

NAME ______________________
RATING OF ____(record/form)____
DATE __________ RATER ______

	Needs Improvements	Adequate	Effective	COMMENTS
Legibility				
Clarity				
Organization				
Conciseness				
Sufficient Detail				
Other:				

3. Once your manager has completed these ratings, meet to discuss them and to clarify in your own mind exactly what your manager sees as effective performance in each of the categories.

4. Rewrite each example paying particular attention to the areas in which your manager marked "needs improvement" and submit the revised reports to your manager for rating. Repeat this procedure until your revisions receive no more "needs improvement" ratings.

5. In the next 2 weeks your manager should select a sample of your recordkeeping (at least five examples), review each example, and provide you with feedback by filling out the grid. Again, any items marked "needs improvement" should be modified until they satisfy your manager.

Criterion: Repeat this sampling process until, after only one rewrite, you get no "needs improvement" ratings and at least one "effective rating" for each of the five examples. Your manager should again sample and rate your recordkeeping effectiveness from 2- to 6-months later to ensure maintenance of a high level of performance.

To Improve the Clarity and/or Completeness of Your Forms, Reports

Feedback from others who may make use of material that you generate can be helpful in improving the quality of your work.

1. Over the next month, keep a record of any work that is returned to you because it is unclear or incomplete. Record these incidences in a notebook designed for this purpose.

2. Determine whether errors or other shortcomings indicate a need for additional effort on your part to overcome a specific deficiency. Decide whether you lack certain skills or need only to be more careful in order to improve your work.

Criterion: When 90 percent of your administrative functions are received without criticism or with praise for a month, you will have completed this suggestion.

To Have Important Decisions Readily Accessible for Your Use and the Use of Others

Decisions that are trusted to memory may easily be forgotten or unavailable for use when they are needed.

1. Have someone take notes at organization or team meetings, paying particular attention to decisions.

2. Organize these in usable form for future reference and file them so that they can be readily located when needed.

3. At the beginning of the next meeting, present your summary of the important points of the previous meeting and solicit feedback as to the accuracy and completeness of your presentation.

Criterion: When you have accurately summarized and filed the results of four meetings, you will have met the requirements of this suggestion.

To Organize Records Into a Useful System

Keeping accurate and useful records requires the sorting of information into a system that is useful to yourself and others.

1. Determine which of the following methods of organization would be most suitable for you and the organization. Arrange material:

   a. In terms of major importance, minor importance, and negligible importance.

   b. Chronologically, What happened first? Next? What preceded what? Why? What were the surrounding circumstances?

   c. In terms of cause and effect, what was the cause of what?

2. Discuss your perceptions with your manager and/or colleagues to determine together which system of organization would be most effective in your particular organization.

3. File frequently consulted records in an easily accessible spot and store rarely used records in a place where they will be out of the way, but where they can still be located if the need arises.

4. Let others know where your records are stored in the event they need to refer to them during your absence.

Criterion: Completion of this activity should result in your spending less time than previously in locating information when it is needed. Also, comments you receive from others should indicate that they have had less difficulty locating records even when you have not been available to assist them.

To Improve the Usefulness of the Files

A review of the files will help you improve their usefulness to yourself and others.

1. Devote some time to a review and update of the files.

2. Discard outdated or irrelevant material, particularly if the information contradicts current information.

3. Train employees in the use of the files so that they may independently find material they need.

4. Keep a record over the next month of incidences where information was either lacking or incomplete.

5. Decide what actions on your part could prevent similar occurrences in the future.

6. Ask others to tell you when they have had difficulty locating or making full use of needed information.

7. Decide what current activities and procedures might be relevant a year from now. Take steps to document them in sufficient detail so that they will be useful to you at that time.

Criterion: When a review of the files has been completed and all the information contained is up-to-date and accurate, this suggestion will have been completed.

To Expand the Use of Filing Systems

The filing systems that you are responsible for should serve as a source of information to help you perform your job. If you are asking others for information that should be available in your files, you are wasting their time and needlessly disrupting others.

1. List all requests you make for information over the next 5 weeks. Each time you notice that the same request is made more than once, write out the information that you obtained and file it for future reference.

Criterion: If you are successful, you will have filed at least 10 such references during this period.

To Increase Knowledge of Filing Systems

The records maintained by an organization represent a type of memory system to which you can turn for information. In order to have easy access to this memory, you must understand the basic system of filing and storage.

1. Prepare from memory an outline describing the system your organization uses to maintain records.
2. Compare this prepared outline with the organizational manual that explains the current system of recordkeeping. All points you have omitted or stated inaccurately are to be written out.

   Review this list daily over a 2-week period.

   At the end of this period, complete the outline again from memory.

Criterion: When you can prepare a complete and accurate outline describing the organization's system of recordkeeping, the objective of this exercise will have been met.

To Maintain Ready Access to Documents and Records by Keeping Them in Their Proper Place

If records and files are kept in their proper place when not in use, they can be easily located by others when they are needed.

Over the next month:

1. File records as soon as possible after they have been completed.
2. Do not allow files to remain on your desk for long periods of time when they are not in use.

Criterion: Completion of this activity should result in feedback from others that indicates that they are finding it easier to locate records when they need them.

To Locate Information More Readily

By keeping your records in an easily accessible location, you will be able to quickly locate information that either you or others want and need.

1. List the types of records you frequently require information from in your work.
2. List the types of records that are referred to rarely.
3. Organize your recordkeeping system according to the preceding analysis.
   a. File frequently consulted records in an easily accessible spot within your work area.
   b. Store rarely used records in a place where they will not interfere with your normal day-to-day work activities but where they can still be located quickly if the need arises.
4. Let others know where your records are stored in the event that they need to refer to them during your absence.

Criterion: At the end of a 3-month period, review any changes that have occurred as a result of your new recordkeeping system. If you have successfully mastered this suggestion, you should find that you are spending noticeably less time than previously in locating records needed by yourself and other individuals. Also comments you receive from others should indicate that they have had less difficulty locating records even when you have not been available to assist them.

To Improve Access to Records

The records you maintain represent a type of memory system to which you can turn for information in their work. In order to plan for easy access to this memory, information must not only be logged, it must also be readily retrieved.

Revamp your personal system of recordkeeping to improve access to the information contained therein.

1. List the types of information contained in your files.
2. Review the advantages and disadvantages of various filing systems such as numeric, subject, alphabetic, and geographic.

3. Determine which of these systems would be most appropriate for the type of information you maintain.

4. List at least two techniques to ease identification of records such as the use of color coding or guides and signposts among folders.

6. Present this outline to your manager for review within 1 month of this review.

Criterion: If the new system of recordkeeping is efficient, the time required to retrieve information from the files should be cut down by at least 20 percent.

To Prevent Reinvention of the Wheel by Reviewing Similar Projects and Adapting Pertinent Procedures and Solutions

Reviewing files periodically can prevent reinvention of the wheel by highlighting past work that can be applied to present projects.

Each time you become involved in a new project over the next few months:

1. Review files pertaining to similar projects that have been done in the past.

2. Integrate this information into a broad perspective to note groupings and trends.

3. Determine if any of the information can in some way be applied to the present project. This might include, for example, materials, procedures, and personnel used in similar projects in the past.

Criterion: Completion of this activity will result in your being able to occasionally apply information from past projects to present projects.

SELLING AND MARKETING

A. ACCOUNT MANAGEMENT

- Protecting and increasing revenues
- Showing account leadership, anticipating problems and resolving them before they become crises
- Taking action consistent with strategies and plans

B. PROSPECTS MANAGEMENT

- Developing new accounts
- Making contacts at appropriate levels
- Maintaining prospect activities consistent with strategies and plans

C. FORECASTING ACCURACY

- Forecasting business accurately in terms of value, order date, installation date, and revenue commencement date
- Covering business booked through data forms
- Forecasting all orders received

DEVELOPMENT ACTIVITIES

A. ACCOUNT MANAGEMENT

To Build and Enhance Account Relationships 209

To Increase Sales of Current Customers 209

To Enhance the Servicing Aspect of Account Management 209

To Improve the Management of Your Territory 210

To Improve Sales Deployment Effort Consistent With Strategies and Plans 210

To Determine Why Customers Are Satisfied 210

To Build and Enhance Account Relationships

The truly astute sales representative is not interested in only making sales, but wants to build account relationships as well.

1. Because the customer is in the position of repeatedly being able to purchase the product, you must show discipline.
    a. You must be willing to forego a sale that is not in the best long-term interest of the account, and, therefore, your relationship with the account.
2. Do not force a marginal sale, you often destroy credibility and the opportunity for future sales.
3. Control your desire for the sale in favor of a desire to hold the account.
4. Recognize, for certain existing accounts, the tradeoff between immediate sales and long-term account relationships.
5. Determine functions that make you a valuable adjunct to the customer's organization-advisory and service functions.
6. Ensure that your firm is meeting the long-range needs of the buyer.
7. For each existing account, generate a plan that is designed to enhance the account relationship. Implement and monitor these plans for the next 6 months.

Criterion: Following this suggestion will result in increased sales and improved customer relationships.

To Increase Sales of Current Customers

This objective relates to increase of sales returns from people who already are your customers and whose habit and patterns of thought are already conducive to such sales.

1. Use a defensive rather than an offensive sales strategy, your selling tactics must be designed to make your position entrenched and secure, impregnable to the assaults of competitors.
2. Be thoroughly familiar with the customer's operations, organization, and personnel.
3. Make the customer's work less difficult by being helpful and useful in improving their job performance; give aid in solving problems.
4. Make an attempt to understand the applications of your product better than the customer's own technicians.
5. Identify every conceivable use, and limitation, of your product, and the engineering behind it and the possibilities of complementary and competing products.
6. Identify with the customer's processes and operations so well that you know precisely where your product can and cannot be used as well as how it must be used in order to yield maximum benefit.
7. Document your past efforts and future plans for a number of customers over the next 6 months.

Criterion: Attention to this suggestion will protect and ultimately increase revenue for each account.

To Enhance the Servicing Aspect of Account Management

After the actual sale comes the service aspect. Often you are responsible for managing installations, training, maintenance support, etc.

1. Recognize that servicing leads to additional account review.
2. Remember that servicing generates sales. Service components, supplies, and replacement parts may account for greater dollar sales revenue than the initial order.
3. Be aware that the service part of the sale may be the opening to new sales.
4. Anticipate problems on your major accounts. For each account, generate a service plan for the next 6 months that pinpoints what services might be used and when. Review the plan after 6 months to determine your accuracy.

Criterion: As you place more emphasis on servicing the customer (management of the customer through the sales program), you will generate greater sales and profits.

To Improve the Management of Your Territory

Territory deployment relates to deploying your sales efforts across geography and task. Territorial deployment is the most operational of all types of deployment.

1. Carefully study your sales account strategy plan (SASP), which should show last year's total sales and this year's sales-to-date.
2. In your planning, give primary consideration to those accounts you can personally influence.
3. To begin your territory planning preparation, prepare a 30-day calendar of calls.
    a. Examine your SASP and business plan to determine your account priority.
    b. See your largest customer first, those that have purchased in the last 6 months. Categorize these into zones or geographical areas in your territory to reduce travel time between calls.
    c. For accounts that have purchased from 6-12 months ago, break them down into dollar categories, and prioritize these accordingly, arrange by geographical zones, if possible.

Criterion: Successful completion of these tasks should enhance your territory deployment effort by 10 to 15 percent.

To Improve Sales Deployment Effort Consistent With Strategies and Plans

Deployment is the conscientious assignment of your sales effort to customers and products and should be viewed as a series of optimizations or tradeoffs.

1. Among customers:
    a. Make a call on a particular customer only if the marginal profit returned to the firm will be greater than the marginal cost expenses, and the marginal profit from this call will be greater than that of competing uses of time, such as calling on other prospects or customers.
    b. Calculate the ratio for each potential call and make those calls with the highest ratio until time runs out or all possible calls with ratios of one or above are exhausted.
2. Across product lines:
    a. Do not second-guess the product policy decision makers by choosing the products to present to your accounts and prospects.
    b. Choose those products that most appeal to your customers or potential customers, in effect you will be segmenting the market and tailoring your firm's offering to each individual segment.
3. Allocate calls in proportion to sales or potential.
4. Define subterritory areas by call frequencies proportional to sales or potential.

Criterion: Deployment cannot be considered as an area separate from other key account management skills. However, increased attention to deployment efforts should improve cost effectiveness.

To Determine Why Customers Are Satisfied

In order to sustain satisfied customers, you should ensure that perceived product benefits correspond to those that you espouse.

1. Identify with your manager an account in another sales representative's territory, secure approval for contact.
2. List persons talked to and titles.
3. List what they like best about our products, services, or system.
4. Identify what problems, conditions, or concerns our products, services, or systems helped to solve.
5. From three products or customers, draw tentative conclusions that could be usefully applied to your sales efforts. Implement these ideas over the next 6 months.

Criterion: Following this suggestion should result in increased sales and improved customer relations.

DEVELOPMENT ACTIVITIES

B. PROSPECT MANAGEMENT

To Identify Those Firms in the Territory That are Worthwhile for Converting Into Business 211

To Improve Opening Skills 211

To Enhance Qualifying Skills 211

To Improve Presenting Skills 212

To Improve Closing Skills 212

To Devote Prospect Time on a More Strategic Basis 212

To Identify and Cultivate High-Potential Prospects 212

To Identify Those Firms in the Territory That are Worthwhile for Converting Into Business

It is the sales representative's responsibility to isolate potential accounts that represent strong and growth sales potential.

Follow this procedure over the next 2 months in allocating time for creating customers:

1. Identify the influential buyer with each potential account.
2. Consider calling on a person in a higher level management position than you usually would for an account of this type.
3. You will need to contact these individuals yourself.
4. An opening session must be planned under conditions that will assure you attention.
5. Establish with these potential buyers a relationship in which you are perceived as a source of possible help in solving organizational problems.
6. Motivate prospects to change by helping them become aware of the need for change; i.e., demonstrating to them that the status quo is no longer sufficient.
7. After this has been accomplished, establish how becoming a new buyer meets the change.

Criterion: Following these suggestions should improve the establishment of new accounts.

To Improve Opening Skills

The opening has two purposes: to determine the right person in the organization to approach initially and to generate enough interest so that it is possible to obtain the information necessary for the qualification.

1. For a potential account, identify the people who are the key buying influences, their desires, the important interactions among buying influences, and the allocation of power among them.
2. Enter the situation with the most powerful person on your side.
3. Determine whether the opening must be made through a particular participant in the decision (such as a purchasing agent). Keep in mind that this individual can veto your proposal, although they cannot ensure eventual acceptance, if approved.

Criterion: The end result of a good opening at a potential account should be an appointment with an appropriate and enthusiastic person, capable of making a purchase decision.

To Enhance Qualifying Skills

Qualifying is the process in which you determine whether or not the prospect is worth the effort of a sales presentation. If the prospect does not qualify, then you can spend your time more profitably elsewhere.

1. Identify the potential account's need for the product.
2. Make the people responsible for buying aware of the need that a sale can ultimately be made.
3. Project the likely profitability of the sale to your company.
4. Determine answers to these critical questions:
   a. Will I be allowed access to enough information to assess the need?
   b. Is the risk of changing current suppliers so high that the prospect will not make the change?
   c. Does the current supplier have a special relationship, such as family or close personal friendship, that cannot be broken?
   d. Can I identify/satisfy the personal and organizational needs of each major buying influence?
   e. Will the sales time be such that the process is not justified?

Criterion: As you develop in this area, you will become more disciplined and objective about the chance to make a profitable sale. There will be instances wherein you recognize that you can spend the time better somewhere else.

To Improve Presenting Skills

Once you have qualified a potential account, the presentation represents the core of the selling process and requires astute management on your part.

1. Identify who should represent the seller company.
2. When several people should represent it, determine who should play what role.
3. Determine who ideally should represent the buyer.
4. Determine if it should be a group presentation or a series of one-on-one presentations.
5. Ascertain the most appropriate content of the presentation.
6. Determine whether the presentation should be formal or informal as well as the appropriate order of presentation.
7. Identify how long and detailed it should be.

Criterion: More presentations should result in actual sales if these suggestions are followed.

To Improve Closing Skills

Closing is obtaining the final agreement to purchase. It is not only important to close the sale, but is important to close it quickly. When you can close quickly, you can be off to make another sale. The profit per sale goes down as the amount of time necessary to close goes up. In addition, the risk of closing the sale increases. Until it is closed, it is not a sale, nor is it safe from competitors or from a decision not to buy a product in that general category.

1. Close by asking key questions, such as "When do you want it delivered?" or "Do you want the tan or black exterior finish?"
2. When objections surface, probe to determine where the objection comes from (e.g., price per performance factor, delivery-installation problems, up-grading problems, etc.)

Criterion: Following this suggestion should result in more sales being closed more quickly.

To Devote Prospect Time on a More Strategic Basis

Prospective efforts need to be based on strategic sales activities, given the current account status.

1. Identify prospects who do not presently use your product or service; here you should place emphasis on the qualification process, separating the prospects from the suspects.
2. Identify accounts that may be ready to upgrade an existing system. Here you need to recognize the potential quickly and to pinpoint the customer's needs accurately.

Criterion: When you have categorized your current prospects according to this classification scheme and initiated the appropriate selling strategy, you have accomplished this objective.

To Identify and Cultivate High-Potential Prospects

This objective calls for identifying eligible and attractive prospects and laying plans for their cultivation. The criteria for good prospects include: high equipment or service migration and growth potential, actual or potential dissatisfaction with current supplier, and the availability of good intracompany contact or referral source.

1. Generate and evaluate leads by:
   a. Estimating the probability of attracting the prospect with $> of effort (A).
   b. Estimating the value of the prospect (if they become a customer) (B).
   c. Estimating the cost of trying to attract prospect (C).
2. Calculate the expected value of the prospect by use of the following formula:

Expected value of the prospect =

$$A \times B - C$$

Criterion: For five new prospects, calculate the expected value and then rank order in terms of emphasis relative to planned selling effort.

DEVELOPMENT ACTIVITIES

C. FORECASTING ACCURACY

To Improve Sales Forecast Accuracy in Terms of Value 213

To Improve Sales Forecast Accuracy in Terms of Timing 213

To Improve the Quality of Business Booked Through Data Forms 213

To Improve Forecasting for Account Decision Making 213

To Improve the Use of Forecast Data in Carrying Out Your Account Management Functions 214

To Improve Sales Forecast Accuracy in Terms of Value

A sales target does not represent an arbitrary choice of sales volume for an account but should, instead, emerge from a careful analysis of historical, current, estimated potential and sales within the account.

1. Accuracy of future sales for your territory accounts can be enhanced by estimating on a segmented basis, such as, for a given geographic area within your territory, product line, or type of accounts.
2. Prior to making value estimates, be certain that you are familiar with information about the firm's marketing plans (to the extent possible).
3. Take into consideration economic factors that impact your customers' needs for your purposes. Estimate your sales forecast value on the basis of product category, units, dollars, percent of total sales, and percent of total selling effort. Each quarter, review to identify categories where accuracy is highest and weakest.
4. Do not be overoptimistic in making values regarding sales forecasts. It is best to be conservative and to assign probability to the likelihood of your estimates at the low, medium, and high ranges.
5. Talk with your manager about the feasibility of linking your sales bonuses to results, percent of quota achieved, and forecast accuracy.

Criterion: More accurate value forecasting will result when you follow the above tasks.

To Improve Sales Forecast Accuracy in Terms of Timing

Forecasting orders on a timely basis is a key skill improvement area that will enable you to minimize back order problems and manage the timely account installation of products.

1. Pinpoint the likely product migration trends for each major account, listing in sequence likely present enhancements and/or additions.
2. Place likely order dates (ranges) alongside each major product migration event.
3. Assign a probability level to the event in terms of the likelihood associated with the account migrating to these new prospects.
4. Estimate the projection's commencement date for revenue flow (rental, lease, purchase, etc.) for each major migration area.

Criterion: If you are making progress in this area, you should find that you are projecting orders from major accounts on a more accurate basis as it relates to timing.

To Improve the Quality of Business Booked Through Data Forms

The use of the data form will ensure the quality of booked business and will subsequently influence the accuracy of overall sales forecasts.

1. On a systematic basis (weekly, perhaps), use the data form as a source of booking business for quarterly sales projections.
2. Categorize product and account information coming from the data form, noting sales trends and how they are influenced by purchasing patterns across various industry sectors.

Criterion: By following these tasks, cornering business booked through data forms will be improved five percent within the business quarter, this suggestion will have been mastered.

To Improve Forecasting for Account Decision Making

A key aspect in any account decision-making situation is being able to predict the circumstances that surround that situation in terms of projected sales. By enhancing your forecasting ability, the quality of decisions you make in reference to your sales effort deployment within the account will also be improved.

1. Consider the range of problems within the account that require forecasting, these may be such items as competitive activity, new or expanding data applications, etc.
2. Classify these provisions in terms of the functional areas to which they relate.

3. Determine the requirements of forecasts within each of these functional areas.

4. Determine what feedback channels have been established in order for you to make timely and accurate forecasting decisions. Outline the specific indicators you feel will guide you in future decision-making efforts.

Criterion: Your overall decision-making framework will improve (at the account level) by completing these foregoing tasks.

__To Improve The Use of Forecast Data in Carrying Out Your Account Management Functions__

Forecast estimates are essential in carrying out three important account management functions: the analysis of account opportunities, the planning of your sales effort, and the control of your sales performance.

1. For each major account, carefully define the score of the present class, including potential systems upgrading.

2. Based upon the magnitude and nature of these opportunities, list three specific sales plans that you can implement to capitalize on the account's potential.

3. For each plan, specify control factors that you can use to gauge your performance in relation to the opportunity.

Criterion: You will have mastered this activity if the goals attained by the end of the quarter are in line with what you expected initially.

TECHNOLOGY-RELATED SKILLS

A. KNOWLEDGE OF JOB/"KNOW-HOW"

- Gaining a broader perspective of your job
- Identifying and being more critical in the use of reference sources
- Broadening technical knowledge
- Keeping up-to-date through course work, reading, and communicating with others

B. QUALITY STANDARDS

- Ensuring that products/services meet reliability and quality standards established by the organization and customers
- Completing work according to specifications
- Conducting evaluations to ensure that equipment is in good operating order

C. COMPUTER PROGRAM/SYSTEM/MODEL INTEGRATION AND EVALUATION

- Developing a plan for integrating/testing the overall system function and interface to identify errors
- Combining tested code into a functioning operating application/system or feature
- Generating program/system test data to evaluate whether implemented code meets design or customer specifications

D. COMPUTER PROGRAM/SYSTEM/MODEL DESIGN

- Obtaining broad description of a program/system's function and defining the major objectives of a program or system project
- Examining hardware, controlware, and software relationships and interfaces
- Establishing design requirements to meet customer specifications including the logic, flow of events, and input and output desired

E. COMPUTER PROGRAM/SYSTEM/MODEL DEVELOPMENT

- Developing or writing programming code using appropriate programming standards
- Developing, enhancing, or correcting systems or features
- Writing specifications for program changes

F. REPAIRING PROBLEMS

- Increasing confidence in ability to work on more and complex repairs
- Developing skills and efficiency in repair functions
- Improving knowledge of tools and housekeeping tasks

G. SAFETY AND MAINTENANCE

- Spotting potential problems
- Reducing problems through improved housekeeping and maintenance
- Improving safety through increasing competence and reducing the incidence of horseplay

DEVELOPMENT ACTIVITIES

A. KNOWLEDGE OF JOB/"KNOW-HOW"

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To More Effectively Communicate Know-How to Individuals Outside One's Area of Expertise 225

To Improve Your Know-How

Most progress on this factor is the result of exposure to new ideas--through personal contact, reading, and coursework. A commitment to furthering your knowledge will result in improved job performance and enable you to contribute more to others.

1. Keep yourself up-to-date technically by reading books and magazines in your field of expertise on a regular basis. If you are unfamiliar with resources, consult a bibliography or ask someone in your area or organization to recommend sources of information.
    a. Take notes on your readings and maintain them in a file for future reference.
    b. Arrange periodic discussions with your manager to review what you have read and make suggestions for future readings.
    c. Utilize the reference librarian in your local or university library to help you locate materials of interest.
    d. If you do not have a library card, apply for one. Most university library systems extend loan privileges to members of the community who ask for and can demonstrate the need for library use.

Criterion: When you have read and made notes on four new sources of information in your field over the next month, you will have accomplished this suggestion.

To Gain a Broader Perspective of Your Job and Its Functions

One way to gain perspective is by increasing the breadth and depth of your reading. Besides technical information and company publications, expand your knowledge base by reading the following:

1. Read current events magazines, such as Time and Newsweek on a regular basis; subscribe or gain access to professional and trade magazines such as Business Week and Fortune in the field of business. In addition to your daily paper, acquire the habit of reading the Wall Street Journal.
2. Devote an occasional evening to television documentaries and public affairs programs, such as "Meet the Press," "Face the Nation," or "60 Minutes."
3. Expand your knowledge by reading material related to managerial functions and organizational development. A good source of books related to various aspects of business life is the Fortune Book Club.
4. Ask a reference librarian for assistance in locating articles of interest to you.
5. Arrange your schedule to accommodate reading time on a regular basis.
6. Develop reading habits that emphasize increased comprehension and a critical approach to the subject matter. Embark upon a self-help program or enroll in a reading improvement course if you have difficulty reading.

Criterion: Reading one book and one magazine weekly for the next month will indicate completion of this requirement.

To Broaden Technical Knowledge

If you believe yourself to be weak in a technical area it is important that you seek further exposure to this area in order to build your familiarity and your competence.

1. Meet with your manager or project leader to discuss the technical areas in which you are weak and could benefit from additional exposure.
    a. Ask to be included in a project that would allow you to concentrate on development of this technical knowledge.
    b. Ask to have a senior co-worker shadow your efforts in this technical area and give you periodic feedback on your effectiveness.
    c. Schedule periodic follow-up meetings with this senior co-worker, your project leader, and/or your manager to discuss your progress and to work through snags you are encountering.
2. Also, have your manager or project leader recommend a worthwhile magazine or journal covering some or all of the technical areas with which you are relatively unfamiliar.
    a. Plan to read at least one article per week from this journal.

b. Make notes on the article and prepare a brief written summary on a file card. Start a file system, organizing your file cards by topic.

c. Reread these file cards before your follow-up meetings so that you can also use these meetings to discuss the articles you read during that period and raise any lingering questions you might have.

Criterion: You will have accomplished this goal when you can honestly claim competence in the technical areas in which you initially were weak. Use the feedback from your shadow as a major index of your progress.

To Improve Knowledge Gleaned From Reference Material

It may sometimes be the case that you are unable to extract needed information from a document or other reference items. The usefulness of such an item would thus be severly diminished.

1. Identify two documents or other sources of information that relate to your job duties. Read and note the major points in each document.
2. Whenever possible, choose information where a behaviorally observable outcome results from knowing the information.
3. Review the notes with your manager to determine if errors or omissions have occurred.
4. Ask or arrange for coaching or training experiences that are designed to help you ferret out the important information and perform a specific behavioral task.
5. Identify two additional sources of information and again repeat the note-taking and evaluation procedure.

Criterion: Substantially improved performance should result on the second set of documents if this suggestion is followed.

To Identify Potential Technical Resources

Being aware of available resources is an important first step toward increasing your level of technical know-how. These resources may include books, periodicals, courses, seminars, and even other individuals either inside or outside the organization.

1. Prepare a list of technical topics that you are required to deal with on the job.
2. Prepare a list of potential technical resources from which you can acquire information related to these topics. Make this list as complete as possible based on your present awareness of available resources.
3. Ask your manager and/or colleagues who have a reputation for being technically up-to-date for their opinions as to the relative worth of the resources you have listed.
4. Ask them to contribute to your list any resources they believe should be included.
5. Develop a plan of action to follow over the next 3-month period in improving your know-how based on these discussions. This might include, for example, regular reading in a particularly well-regarded technical journal.

Criterion: If you have been successful in identifying technical resources, you will find that you will be able to more readily locate information that you want and need and, as a result, will be performing your job more efficiently. In the process, you will also be expanding your level of technical know-how.

To Be More Critical in the Use of Reference Sources

Being able to make effective use of reference sources will help you provide others with requested information quickly and will assist in the timely achievement of objectives.

1. Familiarize yourself over a 2-month period with the available periodical resources within your own and closely related areas of technical expertise in which you may have occasion to do background research.
2. Consult with others in the field if possible to determine how they would rate some of the available reference sources.
3. Review the predominant style in each source. Is it objective? Does it tend to be emotional and/or biased in a particular direction?
4. Find out who the publishers are. There may be conflicts of interest that would affect the sources' reportage.

5. Pick a specific subject and compare the information that the various periodicals provide. Are there conflicting data? If so, try to track down which source is in error and then begin to seriously question its reliability.

6. Select the five sources you believe are the most reliable based on your above analysis. Discuss these with your manager, providing them with the rationale behind your selection and including comments as to why you have chosen to avoid the use of certain sources.

7. Review the knowledge you have gained through this exercise. Ask yourself if it was beneficial in helping you become more critical regarding available reference sources.

Criterion: As you become more critical in your use of available reference sources, you will find that you are able to more quickly provide accurate information to others when they request it and that they are likely to have fewer questions due to ambiguities within the data you have provided them.

To Improve Know-How Through Communication With Other Organizations

Regular communication with other organizations will not only increase your know-how and improve the quality of your job performance but will also assist them in reaching their own objectives.

1. Take the time to respond thoroughly and accurately when employees from other organizations request your advice.

2. Volunteer your experience and expertise to assist them in reaching their objectives.

3. Seek advice and/or assistance from others if it will contribute to the achievement of your own objectives.

Criterion: When you can cite four instances where interorganizational exchange of know-how has contributed substantially to the achievement of objectives, you will have successfully mastered this activity.

To Improve Know-How by Communication With Others

Familiarity with the work of others, both inside and outside the organization, can improve the quality of your job performance.

1. Attend seminars and conventions in your particular field. Arrange for the opportunity to share newly acquired knowledge with co-workers.

2. Become acquainted with individuals whose research or work is relevant to yours. Keep contact with these people through periodic meetings or exchange of information.

3. Locate others within the organization who have and are willing to share knowledge with you.

Criterion: Attending one seminar or convention over the next month is one way to accomplish this objective. Another is to locate and learn from one or two individuals with whom you would not normally have contact.

To Broaden Technical Knowledge by Initiating a Self-Development Program

Adequate job performance requires that you acquire a broad range of technical knowledge to enable you to better understand how your own job fits into broader organizational activities.

1. Read magazines in your field of expertise on a regular basis.

2. Take advantage of the pool of knowledge available from others. Make a point to seek out those people inside and outside your organization who have expertise in your field.

3. When possible, enroll in university courses in your field.

4. Try to get involved in committee work inside and outside your area of expertise.

5. Make a point of belonging to professional societies.

6. Be sure to read all organizational publications thoroughly.

7. Discuss your development of know-how with your manager or peers.

8. Design a regimen of readings and spend a regular amount of time each week reading. Take notes on books and articles you read.

Criterion: Completion of this activity should result in your reading field-related books and journals regularly.

To Develop a Routine for Keeping Up-To-Date

Because you are working in a field where new developments are occurring at a tremendous rate, it is particularly important to establish a routine for keeping up-to-date.

1. Consult with your manager about course work you could take.

2. Arrange a meeting with your manager and several of your co-workers. Focus the meeting on generating a list of topic areas in which development and maintenance of know-how is most critical for effective performance within your organization.

   a. Find out whether any of your co-workers are more informed than you are about any of these topics. If so, ask them if they would be willing to assist you in your efforts to become more up-to-date in these areas.

   b. Find out what resources your co-workers have found useful in keeping informed about each of these topics.

   c. Find out whether there is any interest in holding internal technical sessions on a regular basis.

   d. After the meeting, compile a written outline of the critical topics and the resources (including co-workers) available for building your familiarity with each of them.

3. Develop a concrete plan of action to follow in improving your know-how.

   a. Consider such alternatives as: forming an informal study group with several of your co-workers and having each member take responsibility for keeping the group informed on a particular topic area; pursuing a systematic sequence of readings, including periodic rereading of basic manuals, and building a file of notes on each of the initial topic areas; arranging a series of meetings with individuals inside and outside the organization who are experts on critical topics.

   b. Discuss this plan with your manager to find out how effective they believe it will be in improving your overall know-how, and how it might be made more effective. Revise your plan in accord with their suggestions.

4. Meet periodically with your manager to discuss your progress in improving your know-how.

Criterion: You will have accomplished this goal when you are confident that you have developed a routine for acquiring and retaining familiarity with critical topic areas.

To Increase Your Store of Readily Available Information

In your role as a resource person, you undoubtedly encounter many unusual or infrequent questions that you cannot answer without spending valuable time consulting other resources for the necessary information. To avoid searching for the same information again in the future, it is desirable to record that information the first time you seek it out.

1. Whenever you are asked a question that you cannot respond to promptly, seek out and record the necessary information.

   a. Write down the question and take steps to find the answer as quickly as possible. Even if the person asking the question decides to find the answer somewhere else, you may benefit in the future by having this information already at hand.

   b. In fact, if the person asking the question does go to someone else for the answer, ask them to pass the information on to you. Also, get and record the source of the information so that you will know where to turn if you have any related questions.

   c. Record all this information in a notebook or on a file card so that you need not rely upon your memory.

2. Start a file system so that you can readily retrieve the rarely asked for information you have recorded.

   a. Whenever you find out new information, write it down and enter it in your filing system.

b. Make sure that your filing system is indexed clearly and specifically enough so that you can find information quickly. You may need to experiment with various cross-referencing techniques until you find one that allows you speedy access to all your records.

Criterion: When you find that you are honestly able to describe yourself as a person who seldom looks up the same piece of information twice, then you will have accomplished this goal.

To Improve Know-How Through Additional Training

Employees who are motivated to expand their knowledge through outside experiences can avail themselves of many opportunities.

1. Use the resources of the local public or university library. Library cards at university libraries are usually available upon request from community members.
2. Investigate course offerings from local universities that are relevant to your job duties.
3. Consider how additional schooling would affect your career possibilities within the organization. Many schools offer programs that can be completed part-time or at night, enabling employees to continue at their jobs.

Criterion: Discussing these possibilities with your manager and taking advantage of one or more of the options will indicate completion of this suggestion.

To Improve Know-How Through Course Work

With knowledge increasing at a fantastic rate, we are losing ground by standing still. In order to keep up-to-date in your field, continue to enroll in relevant courses and seminars.

Over the next several months:

1. Enroll in a course or seminar related to your field of expertise or to general management knowledge.
2. Familiarize the instructor with your particular needs and interests so that they can take them into account if possible in teaching.
3. Submit a written report to your manager upon completion of the course or seminar.
4. Outline what you learned from the course or seminar and emphasize specific ways you think you can apply this knowledge to on-the-job situations.
5. Check back with your manager 3 to 6 months later to discuss to what extent you are still applying this knowledge.

Criterion: Completion of a course or seminar and the ability to still apply the knowledge to the job 3 to 6 months later will be your measure of success in this activity.

To Increase Understanding of Job Scope

There are a number of tasks in any job that you are expected to handle without being told. It is important that office personnel are aware of and assume responsibility for such routine tasks.

1. Meet with your manager to prepare a checklist of all tasks you are expected to routinely perform on your own initiative. The frequency with which each activity is to be performed is to be clearly specified and recorded under each listed item.
2. Over the next 2 months:
    a. Review this checklist at the beginning of each workweek.
    b. Determine which of the listed activities should be completed during the week and transfer reminders onto the appropriate date pages of your calendar.
    c. Record on the checklist the time at which each activity was actually completed.

Criterion: If you have been successful, each task for which you have assumed full responsibility will have been taken care of at the appropriate time interval.

To Increase Understanding of Established Operational/Administrative Procedures

Operational/administrative procedures represent a type of pathway. The pathway is designed to maximize the use of your time, to ensure that work is completed according to set specifications, that equipment is utilized properly, and to coordinate your work with others in the organization.

1. Prepare, from memory, detailed instructions on how to go about each of the routine job activities.
   a. These instructions are to be submitted to your manager for review within 2 weeks of assignment.
   b. The manager is to point out procedural errors and/or instructions that are incomplete.
2. Revise the original set of instructions based on the manager's comments. However, the original set is to be kept for later comparison.
3. Allot 5 to 10 minutes per day during the next month to study the revised set of instructions. Whenever hesitant concerning established procedures, turn back to the instructions to clarify the issue.
4. Write down, at the end of this month, from memory detailed instructions covering job activities.

Criterion: If you have been successful, the increased knowledge of the operational/administrative procedures covering the position should be evident through a comparison of the two sets of prepared instructions. Aim at correcting 90 percent of all errors and omissions that were made in the first set of instructions.

To Evaluate Current Operating Procedures

Once you have gained a thorough knowledge of the operational procedures covering your job it is possible for you to begin actively evaluating them. Since operating procedures have a habit of becoming set and ingrained, it is necessary to periodically look at them from a critical viewpoint.

1. With your manager select one or two work procedures that have not been updated over the past 6 to 8 months.
2. Prepare an evaluation of these selected work procedures. The evaluation should:
   a. Outline the steps involved in the procedure.
   b. Appraise each step as to its effectiveness and efficiency.
   c. Develop a corrective action plan for each criticism made of the operation.
3. Present the completed evaluation to your manager for review within 3 weeks of the initial assignment.
4. Implement any changes to standing procedures your manager okays.

Criterion: If you have successfully evaluated the selected work procedures, this exercise will have been completed.

To Increase Knowledge About Equipment Used on the Job

In order to make full use of equipment, it is necessary to develop an operational understanding of the machinery involved. This entails knowing for what purpose a particular piece of equipment was designed, its correct operation, and its limitations.

1. List all the equipment that is operated on the job. For each piece of equipment, someone in the organization should be selected to present a demonstration outlining proper use. Notes are to be taken during this instruction period.
2. After each observation period, obtain an instruction manual for the equipment. Key points from the manual are to be integrated with your notes in order to come up with personalized instructions for future use. The points covered should minimally include:
   a. A list of what the machine can and cannot be used for and step-by-step operating instructions.
   b. A red-letter list of precautions that must be kept in mind while using the machine. This should include precautions for personal safety as well as any particular sensitivities the machine has--operating techniques that should be avoided in order to ensure its smooth operation.
3. Prepare a notebook with sections to contain reports on each piece of equipment.
4. Over the following 6 weeks, whenever the equipment is used, review the appropriate section of this notebook to reinforce knowledge concerning correct operating procedures.

Criterion: Once you have prepared a complete notebook and referred to it for a 6-week period, this exercise will have been completed.

To Improve Knowledge of Specialized Equipment

Situations involving the use of specialized equipment often require training experiences above and beyond those required for normal functions. Nonetheless, it is vital that you are able to operate such equipment when called upon to do so.

1. Anticipate what equipment you may be called upon to operate and arrange for training experiences before you actually require equipment in the course of work. This may take whatever form is appropriate, such as independent reading or observing a skilled operator using the equipment.
2. Arrange training seminars for others to maximize efficiency in the training of specialized equipment.
3. Ask your manager to designate someone as a resource person for a piece of equipment you must use with which you are only marginally familiar.
4. Maintain a list of relatively permanent people in the organization who have familiarity with the equipment and can be used in training experiences.

Criterion: Implementing these suggestions should improve your know-how of specialized equipment.

To Keep Informed of Standards and New Developments

The confident employer is one who keeps abreast of new developments and performs according to current standards.

1. For information to be of use, it must first be available. Ensure that access to relevant documents is provided and that the updating of knowledge becomes a regular component of organizational procedure.
2. For the next month keep a record of situations where your performance is hampered by a lack of knowledge or use of outdated standards.
3. Whenever such a situation arises, assume responsibility to update your knowledge.

Criterion: At a second evaluation the number of problems caused by knowledge gaps will be substantially reduced if this suggestion is followed.

To Maintain Development Through Job Goals

The employee who has goals is more likely to develop in the position than an employee who has no direction.

1. Meet with your manager to elicit goals that would improve job functioning.
   a. Together design implementation plans and assessment criteria for these goals.
   b. Project reasonable time frames. Some goals probably can be accomplished in a month or less; others will require more time.
   c. Identify or provide necessary support functions for goals to be reached.

   If you are unable to spontaneously identify job goals, your manager will suggest readings or resource people to help in this process.

Criterion: Defining, implementing, and evaluating two goals in the next 6 months will indicate completion of this suggestion.

To Develop Competence in Another Application/System

The more application/system fields in which you can effectively solve problems, the more valuable and flexible you are. You may find it desirable to take the initiative in expanding in competence in this respect.

1. Meet with your manager to decide upon the specific application/system field in which it would be most beneficial for you to develop competence.
   a. Have your manager designate a co-worker with whom you can work in building your expertise at solving problems in this new field. The co-worker should be either someone your manager already considers proficient in solving problems within this particular field or someone whom your manager would also like to see develop such proficiency.
   b. Plan to purchase and study a good textbook within this field. If your co-worker is to be your teacher, ask them to recommend the text; if your designated co-worker is also learning the new field, have your manager or an outside expert recommend a textbook.

c. Aim to read one chapter a week.

d. At the end of every week meet with your co-worker to discuss any problems or questions you are encountering and to practice your new skills as they develop.

e. Meet with both your co-worker and your manager once a month to discuss what you have learned and to draw up a new plan of action for the upcoming month. Ask to work on projects that will allow you to get on-the-job training in using your new skills.

Criterion: When you are able to effectively handle project assignments within the new application/system field, you will have accomplished this goal.

To Increase Appropriate Use of Organizational Forms

Organizational forms are designed to assist you in presenting information in an easily read format. To be effectively employed, you must have a thorough understanding as to their appropriate use.

1. Prepare a personalized manual covering the proper use of all organizational forms you are responsible for your work. Over the next 3 weeks, each time you use a form:

   a. List the instances in which the form is appropriately used.

   b. List all entries that must be made.

   c. Attach the two lists to a copy of the form and insert it into their manual.

2. At the end of this period, the completed manual is to be presented to your manager for review. Make suggested revisions.

3. Over the next month, each time you use a form, refer to your prepared manual and briefly review the prepared lists.

Criterion: During the last 2 weeks of this month, negative feedback regarding the improper use of organizational forms should be completely eliminated.

To Capitalize on Skill in Handling Equipment

If you have exhibited skill in handling machinery, it is possible that this technical orientation should be further developed. This could be achieved by increasing the range of equipment with which you are familiar and/or by increasing the amount of time spent working with equipment.

1. Meet with your manager to determine how expertise in this area could be made more operational. Suggestions could include:

   a. Training in the use of additional types of equipment

   b. Becoming the initial contact in the organization for transactions outside of the organization

   c. Instructing other employees in the proper use of equipment

2. A feedback discussion is to be held with the manager within 1 month to review any problems that might have come up in assuming these new responsiblities.

Criterion: Once you have increased your work responsibilities with equipment by taking at least one additional task, the requirements of this exercise will have been met.

To Capitalize Upon Competence in an Unusual Application/System Field

If you are effective at solving problems within an application/system field that is unfamiliar to several of your co-workers, consider tutoring them in this field. This will hone your own expertise as well as broaden the staffing flexibility within your whole organization.

1. Prepare a written outline of the sequence of readings, intermingled with skill practice sessions, that you think would be most helpful to someone who was trying to learn to solve problems in this particular application/system field.

   a. Meet with your manager to work out a feasible method for implementing this learning sequence.

   b. Circulate this written outline among your co-workers with a memo indicating your willingness to serve as a tutor or expert resource person should anyone wish to actively pursue the learning sequence contained in your outline.

2. As you tutor people in this new field, seek feedback from them as to the strengths and weaknesses of your tutoring program.

   a. Continue to revise your program in response to this feeedback.

   b. Seek additional periodic feedback from your manager as to the continuation of the need for this learning sequence or the possible desirability of new learning sequences in other, related areas.

Criterion: When you honestly believe that you can claim at least partial credit for a co-worker's increase in proficiency at solving problems in your application/system field of expertise, you will have accomplished this task.

To Share Know-How With Colleagues

The sharing of information will promote a climate of interest and enthusiasm as well as increase the efficiency of information gathering and dissemination.

1. Over the next month, visit other organizations to broaden your exposure to different areas and learn about their specific functions.

2. Set up interorganizational luncheons or informational exchange meetings to discuss common problems and interests.

3. Organize a lending library within your organization or in conjunction with other organizations. When you come upon a good book or article, circulate the information so that others may benefit from it.

4. Maintain a file of brief book reviews or annotated bibliographies of material you found useful. Locate these where they are accessible to others and encourage them to make their own contribution.

5. Recommend specific materials to others that will help them develop expertise and assist in their job functions.

6. Ask or assist your manager in putting together a syllabus designed to meet the needs of a particular position or organization. File these so that they may be reused as others need training. Periodically update the file.

Criterion: When you have organized an information exchange and arranged to meet with other organizations periodically, you will have accomplished this suggestion.

To Capitalize on Strengths in Know-How By Creating an Information Exchange System

Subscribing to professional journals and magazines and belonging to professional societies may not be sufficient to stay abreast of the latest developments in your field. Opportunities must be sought to pool collective knowledge so that you and your co-workers keep up to date.

1. Volunteer to set up an information exchange system within your organization over the next 3-month period. Think of it as starting an in-house library specifically designed for the purpose of sharing information about new developments.

2. Prepare short critiques of worthwhile articles you read regarding new developments. Maintain a file of these critiques in a location close to where the pertinent journals and magazines are kept.

3. Write a brief summary of seminars or presentations you attend related to new developments. File these summaries in your library as well.

4. Circulate a memo to your co-workers informing them of your efforts and requesting their assistance and cooperation in keeping your library up to date. Explain your belief that sharing information with others eases the load of trying to keep up to date on one's own.

5. Ask them to contribute critiques of articles or books they believe to be worthwhile and summaries of information they have obtained through recent seminars or presentations.

6. Maintain an index of all materials on file in your information exchange library. Periodically update this index and circulate it through the organization.

7. Review the success of the information exchange system at the end of the 3-month period. In particular, ask your co-workers and manager for their suggestions as to how the system might be improved.

Criterion: If the information exchange system is serving its purpose, you will find that co-workers who previously relied on you to provide them with information will now tend to ask fewer questions. In a more general sense, you will notice that projects are being carried out more efficiently because others now have more accurate and complete technical information readily at hand.

To Capitalize on Strengths in Know-How

Possessing a high level of know-how is one thing; putting it to good use is another. Capitalize on your know-how by seeking innovative solutions to problems and irritations within your organization or by assisting other units or organizations in doing the same.

Over the next few months:

1. Utilize your know-how by volunteering to head up a task force to develop an innovative solution to a recurring problem or irritation.
2. Let your know-how show through to others during your meetings. However, encourage a free exchange of ideas, since this will only add to the richness of your discussions.
3. Attempt, as a group, to arrive at the one best solution to the problem at hand.
4. Develop a timetable and plan for implementation of this innovative solution. If the solution is in conflict with organization policy, make sure it is carried through the proper channels prior to implementation.
5. Schedule a follow-up meeting with group members to discuss how successfully the solution has been implemented.

Criterion: Completion of this activity should result in positive feedback from others on the success of the innovative solution.

To Capitalize on Strengths in Know-How by Assisting Others

Capitalizing on your strengths in know-how by assisting others in reaching their objectives will increase your overall value and contribution to the organization.

1. Make a list of your major strengths as they relate to technical know-how. This list should include activities you have performed well, both in this and past jobs.
2. Discuss this list with your manager and determine if they feel any modifications are necessary.
3. Together generate ideas as to how you might capitalize on these strengths to assist others in reaching their objectives.
4. Implement these ideas over a 3-month period.
5. Request feedback on an ongoing basis from individuals to whom you offer assistance.

Criterion: At the end of the 3-month period, analyze the feedback you have received from others. If the feedback they have provided you with has been largely of a positive nature, you will know that you have been doing an effective job of sharing your know-how with others.

To More Effectively Communicate Know-How to Others

Communicating know-how to others on the job, if properly done, can help ensure that tasks are carried out in the most effective and time-efficient manner.

1. Maintain a written record over the next 2-month period of instances where you are asked to provide explanations or assistance to others. Include the following in your record:
   a. Details of the information you provided to the individual
   b. Questions asked
   c. How you responded to each of the questions
2. Follow up informally on how the individual actually carried out the task. If the results achieved by the individual are not what you thought they would be based on your initial discussions with them, try to determine exactly why. If necessary, review your notes to pinpoint the reasons behind the lack of understanding.
3. Incorporate the feedback you receive into your approach to subsequent occasions where you must provide similar explanations or assistance to others.

Criterion: As you become more effective in communicating know-how, any discrepancies between information you provide to others and how they actually make use of this information will steadily decrease.

To More Effectively Communicate Know-How to Individuals Outside One's Area of Expertise

In talking with individuals outside of your area of expertise, you must be certain to gear your conversation to their level of technical knowledge. Suprisingly, talking either over or under the head of your listener can imply that they are not sufficiently sophisticated. This can only, of course, impede communication.

1. Attempt to obtain background information on the level of knowledge of individuals before entering meetings or discussions with them.

2. Gear your communications to their level of knowledge and expertise.

3. Be constantly sensitive to your use of vocabulary. The other individual must never feel that you are talking down to them. At the same time, avoid unnecessarily technical language or jargon.

4. Be aware that a lack of questions from your listeners does not always mean a complete understanding of what you have said. Ask your listeners to rephrase what they think you have said. This can be an excellent vehicle by which to check on their understanding.

5. Follow the above procedure over the next 1-or 2-month period each time you engage in an important business interaction with an individual outside of your technical specialty.

Criterion: Completion of this activity should result in meeting times with individuals outside your technical specialty being spent more productively. You should find that you devote less time to seeking common ground and have more time left for the business at hand. In addition, you should be asked fewer questions that are simply a result of misunderstanding what you said.

DEVELOPMENT ACTIVITIES

B. QUALITY STANDARDS

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To Locate and Eliminate Causes of Low-Quality Work

By locating the causes of low-quality work and working to remove these, you will increase the extent to which your work meets established standards.

1. Prepare a list of possible causes of low-quality work in your area of assignment. These might include:

    a. Limited knowledge regarding standards

    b. Insufficient documentation

    c. Improper choice of design method

    d. Lack of training

    e. Lack of ability

    f. Lack of design reviews

    g. Carelessness

    h. Defective material

    i. Equipment failure

    j. Inappropriate design of machine and/or tool

    k. Speed of production in relation to machine capacity

2. Keep a running record of all instances in which quality standards are not met. Classify each instance according to your prepared category of causes.

3. Review this record periodically to determine the most consistent cause of listed defects.

4. Set yourself the goal of eliminating this cause. If you cannot meet this goal on your own, seek assistance from your manager or a senior colleague.

Criterion: When your record indicates that you have met your goal and eliminated the major cause of low-quality work, you will have met the requirements of this exercise.

To Improve Customer Communications

A common source of difficulty in meeting specified requirements lies in a weak communication link with the customer. Alternatives must be investigated and explained to the customer in the early stages of a program. The expectations of the customer must then be translated into accurate and detailed specifications.

1. Arrange, with the approval of your manager, to accompany a senior colleague engaged in customer-related discussions or presentations. Remain in the background as much as possible during these meetings, but pay close attention to exactly what they do when communicating with the customer. In particular, notice how they attempt to clarify and break down general criteria stated by the customer. Watch how they handle situations in which the customers' requirements are unfeasible or inconsistent.

2. Discuss the customer interaction with the senior colleague after each meeting. Tell them in what ways you would have been motivated to act differently. Ask them how satisfied they were with the interaction and in what ways (if any) they would have acted differently to deal even more effectively with the customer, looking back on the situation.

3. Write out for yourself a mini-developmental plan listing the areas in which you would like to work on your skills in customer communications. Review this list with the senior colleague to obtain their input.

4. Arrange to take a more active part in the next customer-related discussion or presentation. Meet with the senior colleague before the meeting so that they can provide you with some basic guidelines regarding this particular customer interaction.

5. Sit down with the senior colleague after this meeting to discuss your performance and to give you additional suggestions for improving your effectiveness in customer communications.

7. Revise your mini-development plan to reflect this conversation and review with your manager, asking for their input as well.

7. Study this plan prior to all customer negotiations you participate in over the next 6 months.

Criterion: If you have improved in this area, the number of instances in which developed specifications are in accord with customer requirements will steadily increase.

To Improve Clarity of Specifications

Effective designs are difficult, if not impossible, to develop without first having clearly stated specifications. When generating specifications, you must take care that persons, vendors or customers will not interpret the specifications to have a clearly different meaning than intended.

1. Develop a list of characteristics that distinguish clearly stated specifications from ones that could be misinterpreted easily. Review this list with your manager or a senior colleague and revise it to incorporate their suggestions. Type this final list on a sheet of paper for future referral.

2. Each time you prepare a set of specifications, evaluate your first draft against your checklist. On a scale from one to ten, rate the overall clarity of your specifications. Be objective: this rating is for your eyes only. Record your rating, along with a brief narrative justification, summarizing major strengths and weaknesses on an index card. Date the index card and file it away. Finally, revise your rough draft of the specifications so that the new version would, in your eyes, warrant a rating of at least nine out of ten for overall clarity. If you wish, you may seek assistance on the revision from your manager or the senior colleague.

3. Periodically review your index cards to identify the more consistent weaknesses in your rough drafts of specifications. Set yourself the goal of improving at least one of these characteristics the next time you prepare a rough draft of some specifications. If you cannot meet this goal on your own, seek assistance from your manager or senior co-worker who helped you previously.

Criterion: When you have assigned overall clarity ratings of nine out of ten to your rough drafts of three consecutive sets of specifications, and eliminated all of your previously consistent weaknesses, you will have been successful.

To Ensure Design Meets Specifications

If a design is to pass design verification testing, all established requirements must be correctly interpreted and incorporated into the design work.

1. Each time you are engaged in design, prepare a checklist of the specification requirements.

2. Interpret the contents of each specification and write this in abbreviated form across from each requirement.

3. Ensure that each listed specification is incorporated into your design work.

4. Keep a record of all instances in which:

   a. Your interpretation of the specification requirement proved to be inadequate or incomplete.

   b. Your design work failed to incorporate all requirements.

5. When your interpretation of the specification requirement is inadequate or incomplete, record the requirement as given to you. Across from this record the correct interpretation. Keep these posted in a notebook you review on a periodic basis.

Criterion: If this exercise has been worthwhile, the quality of your interpretation of design specifications requirements should increase and the number of requirements that are overlooked in design work should steadily decline.

To Increase Knowledge of Design Reliability

Although design ground rules established for a particular product or technology will generally be the appropriate guidance for reliable designs, you may find it helpful to increase your knowledge of unreliable design components by participating in the preparation of a Reliability Index.

1. Obtain some reading material outlining the preparation of a Reliability Index. One recommended reading is Design Methods by J. C. Jones. Part two contains a brief, but good review of how Quirk's Reliability Index for mechanical devices can be employed as an evaluative device.

2. Meet with your manager to see if it is possible for you to monitor or participate in the preparation of a Reliability Index for a product type with an experienced co-worker.

3. Ask the chosen co-worker to explain in detail the basis for each unreliability index number assigned to the pairs in the interaction matrix. By doing so, you should be able to pick up on some of their experience and knowledge regarding the reliability of various components.

4. Meet with your manager once the Reliability Index has been completed to review what you have gained from this experience.

Criterion: You should notice that you are using information gained from this exercise to assist in making day-to-day design decisions.

To Increase the Simplicity of Design Work

The simpler and more straightforward a design, the easier it will be to test and manufacture. As a result, there will be less opportunity for work defects in the manufacturing process.

1. Examine every position of your documentation/drawings to identify and revise all sections that can be further simplified. Set yourself the goal of finding at least one feature to simplify in every design. If you cannot find any section that warrants simplification, ask a colleague to examine the design and give you their ideas as to features that warrant simplification. If they cannot find any feature that warrants simplification, ask a senior colleague for a second opinion.

2. Work closely with representatives from the production function. Keep a notebook to record their comments regarding design simplification. Look over these notes periodically to see whether there are particular circumstances in which you seem to produce unnecessarily complicated designs. Then be alert to the occurrence of these conditions and, when you run across them in the future be careful to scrutinize your designs.

3. The design review process, internal and/or customer, will also address this issue. Record comments from this process regarding design simplicity into your notebook.

4. To monitor the advantages of simplifying your designs, keep track of the following:

   a. The number of items the test lab returns reports stating that specifications have not been met. (It should be decreasing.)

   b. The simplifications that you did not detect when reviewing your own designs but were detected and recommended by your colleagues. (The frequency of repetition of similar types of unnecessary complexities should be decreasing.)

Criterion: When you have designed a drawing that you and a senior colleague judge to be free of any features warranting further simplification you have been successful.

To Improve Understanding of the Production Function

If established quality standards are to be met, you must ensure that your documentations/drawings are readily produceable.

1. Work closely with several representatives from production and/or quality control so that they may give you detailed feedback regarding the difficulties your documentations/drawings might encounter in the prototype and preproduction stages. Inform them that as part of your development program, you are trying to increase your knowledge of the feasibility of various specifications from the perspective of production.

2. Keep a running record over this period of the feedback received. Record each design problem along with a brief narrative of your consequent discussions with production representatives.

3. Periodically review this record to identify the more consistent weaknesses in your documentations/drawings. Aim to eliminate these in your subsequent design work.

Criterion: If you have improved in this area, your record should indicate a steady decline in the number of problems that production and quality control are encountering in implementing your design work.

To Ensure Equipment is in Good Operating Order

The maintenance of quality is a direct result of the accuracy of machines used in production as well as tools and instruments used for measurement and inspection.

1. Prepare a list of all the machines, tools and instruments for which you are responsible.
2. Draw up a checklist for each piece of equipment outlining its various operational capacities. Note below each item a technique for testing out this capacity.
3. Set up a schedule for testing the equipment over the next 6-month period. Transfer reminders onto the appropriate date pages of your calendar.
4. During this 6-month period, employ your checklists each time you test equipment. Check off each item for which the stated capacity proves operational. Begin repair procedures within 24 hours of any noted equipment failure.

Criterion: Success in this area will be evidenced by the extent to which your equipment is maintained in good operating order.

To Ensure Equipment is Properly Operated

You should be especially alert to the possibility that equipment failure in your area results from, or is aggravated by, improper operation or improper maintenance. If this is the case, it is your responsibility to make arrangements for training, retraining, or disseminating the necessary information to all who come into contact with the equipment.

1. Meet with your manager to discuss ways in which you might be able to determine whether and in what areas others are in need of more information concerning equipment operation. Discuss both the mechanical indications and the signals you might pick up through observing others' work patterns.
2. Determine the most effective ways of broaching the topic of retraining or providing additional information to the staff.
3. Submit a brief report to your manager over the next 4 months after every noted equipment failure in your unit indicating:
   a. Type of equipment and the nature of the failure
   b. Whether or not you feel the employees are in need of additional information
   c. What arrangements you have made (or will make) to provide the necessary information

Criterion: These reports to your manager should show evidence that employees are being systematically trained in the proper operation of equipment.

To Capitalize on an Ability to Translate Customer Expectations Into Written Specifications

Employ your strong skills to help others less skilled in this area.

1. Use your experience with customers to more completely define in your own mind the factors that contribute to effectively working with a customer in developing product standards.
2. Prepare a handout for other employees on Pointers for Customer Negotiations after the experience. List those behaviors that promote an understanding of customer expectations and those behaviors to avoid.
3. Review this handout with your manager and make any modifications they suggest before distributing it to others.

Criterion: After you have prepared an approved handout and distributed it to others you will have completed this activity.

To Capitalize on a Knowledge of Design Reliability

Employ your knowledge of design to help others less skilled in this area.

1. Meet with your manager to select several inexperienced co-workers who could benefit from your experience in design.
2. Obtain some reading material outlining the preparation of a Reliability Index. One recommended reading is Design Methods by J. C. Jones. Part two contains a brief but good review of how Quirk's Reliability Index for mechanical devices can be employed as an evaluative device.
3. Select a product your co-workers are currently working on.
4. Prepare a Reliability Index for the product selected.

5. To determine the unreliability index number for each pair in the interaction matrix, have each employee write down their estimate. Subsequently present your determination. Explain in detail why you have assigned a particular index to the pair. Try to support your estimate by examples from your past work in design.

6. Illustrate how the completed reliability index can be applied to increase the design reliability of the selected product.

Criterion: If this exercise is worthwhile you will have used the experience to more completely define in your own mind the reliability of various components and others involved will be able to use the knowledge you have passed on to them in their day-to-day design work.

DEVELOPMENT ACTIVITIES

C. COMPUTER PROGRAM/SYSTEM/MODEL INTEGRATION AND EVALUATION

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To Increase Thoroughness of Testing

It is important that every computer program/system be vigorously tested before it is approved for installation. Thus, if you find that you are unable to write some tests from the production documentation alone, it is important that you do not simply omit testing this aspect of the product.

1. Whenever you find that you cannot write some test that you deem important, seek immediate advice and clarification on the documentation from the members of the design and implementation team.
   a. Keep track of the number of times that the problem arose from a weakness in the documentation as opposed to weaknesses in your own proficiency in designing tests.
   b. Record all relevant details about the nature of the tests that you are having unnecessary difficulty writing (i.e., where the weakness lies in your own skills rather than the documentation).
   c. Periodically examine this record to identify any patterns or consistencies in the tests with which you have particular difficulty.
2. Ask your manager or a senior co-worker to suggest ways in which you can improve your skill in writing the types of tests with which you are now experiencing difficulty.
   a. Develop a concrete plan of action for following these suggestions.
   b. Meet periodically with your manager/co-worker to discuss your progress in following this plan and to evaluate its effectiveness in helping you to write the tests that were previously causing consistent problems to you.

Criterion: When you find that inadequate documentation is almost always (for example, more than 90 percent of the time) the explanation of your inability to write tests without consulting members of the design and implementation team, then you have accomplished this goal.

To Become More Familiar With Debugging Techniques

Debugging packages and techniques must be used judiciously or they will provide voluminous output with little or no useful information. To make best use of your time when debugging a program (to minimize the time you spend combing through uninformative output), you need to be familiar with the different techniques available and the programming situations in which each is most useful.

1. Develop a comprehensive outline of the debugging packages and techniques available for your use. For each technique listed in your outline, include the following information:
   a. Brief description of what it does
   b. Conditions in which it is most useful
   c. Other comments, if any, that might aid you in using the technique
2. Consider highlighting the debugging facilities in specific languages and on specific systems.
3. Gather this information by reading your programming manuals and seeking advice from your co-workers.
4. Two examples of the type of information you could include in your outline:
   a. Statement trace:
      1) Prints the contents of all the variables (and registers, accumulators, etc.) affected by a program statement, both before and after that statement has been executed.
      2) Used when all other forms of debugging have failed to locate the bug.
   b. Time-oriented trace:
      1) On a periodic basis, prints (or copies onto disk) the contents of selected areas of memory.

2) Used with real-time programming systems when the bug cannot easily be associated with a particular variable or subroutine.

3) The trace takes place on a random basis if the bug has proven extremely difficult to find.

5. Keep this outline available so you can consult it when needed. Review it during lull periods to maintain your familiarity with the information.

Criterion: The index of your successfulness in accomplishing this goal will be the increased efficiency of your debugging activities and the increased range of debugging techniques that you can use effectively.

To Become Proficient in Using a Wider Range of Applicable Tools

Your efficiency during the integration and evaluation phases of your work activities depends to a large extent upon the range of tools you are able to use effectively. Debugging techniques are only one subset of those tools.

1. Talk with your manager and co-workers about tools you are currently using during integration and testing. Ask for suggestions as to how you might use them more effectively. Ask for suggestions as to alternative tools you might use.

2. Identify the techniques you would like to become more proficient at using.

3. Watch for opportunities to work these techniques into plans for product testing. After applying each technique, meet with your manager or a skilled co-worker to discuss your use of the technique as well as its effectiveness for the intended purpose. Continue this until you feel confident about your skill in using each of the techniques.

Criterion: As you become proficient in using a wider range of techniques, you should begin to realize a savings in time during the integration and evaluation phases of your activities.

To Improve Use of Automated Testing Techniques

It is important that program/system testing be conducted as quickly and completely as possible. Manual testing is considerably slower and hence less likely to be complete than automated testing.

1. Find out what automated testing packages or techniques are available for your use. (For example, in generating test data, in constructing test files, in checking output).

   a. Obtain lists of all these automated testing techniques along with a brief description of how each can be used. These should be highlighted in manuals, etc.; ask your manager for sources of such lists.

   b. Read about these techniques, practice using them, and discuss them with your co-workers until you feel confident in your ability to use them effectively.

2. Whenever you find yourself planning to manually conduct some portion of a test, review your list of automated testing techniques to determine whether one of these might be a more efficient substitute.

   a. If you decide that there is no automated technique that would be more efficient, ask for a second opinion from a co-worker who is know for their efficiency in conducting tests.

   b. If this co-worker agrees with your decision, you should either go ahead with the manual procedure or, if appropriate, try to develop a suitable automated technique.

Criterion: When you find yourself willing to use manual test verification and code checking only as a last resort, and you are knowledgeable about the available automated techniques, then you will have accomplished this goal.

To Increase Efficiency of Debugging

In debugging large, complex programs, organization and methodical thoroughness are the keys to efficiency. Because it is possible for debugging to extend over many months, efficiency is critical.

1. Monitor your own debugging efficiency by maintaining a written record of your progress whenever you are debugging a program.

   a. Keep a notebook specifically for these records.

   b. Briefly describe every investigative activity (core dump, trace, etc.) that you conduct, then note how much time it took and what information if any, it provided about the nature and location of the bug.

   c. Be sure to include descriptions of your nonmechanical, desk-checking activities. Be as explicit as possible in recording what you were thinking about, what questions you were trying to answer, what conclusions you drew, and so forth.

2. After successfully debugging a program, review your record of all your investigative activities.

   a. Make note of the activities that provided little or no information about the bug.

   b. Check to see if the most time-consuming activities paid off in terms of providing critical information.

   c. Try to follow-up on these ideas the next time you debug a program.

Criterion: When you are conducting your debugging so that at least 90 percent of your mechanical investigative activities (core dumps, traces, etc.) provide useful additional information about the nature and location of the bug, you will have accomplished this goal.

To Increase Thoroughness of System Testing

The larger the system you are testing, the less likely it is that you will be able to conduct exhaustive tests and the more important it is that you plan to take a systematic, methodical approach.

1. Before running any tests, write a plan that includes at least:

   a. A list of the errors you want to test for

   b. How you plan to test for the presence of each of these errors

   c. The criteria you plan to use for judging success (that is, for concluding that the errors are not present)

   d. How you plan to demonstrate that the entire system is working effectively, that the process has been mastered

2. Before running any test, carefully examine the adequacy of your plan and revise it as necessary. Then submit it for review; if your work group has no formal review process, ask your manager or a skilled co-worker to critique your plan. Only after revising your plan once again should you begin testing.

3. As you are conducting the tests, put checkmarks by the completed portions of the plan. If co-workers are conducting some of the testing, ask them also to keep track of their progress by placing checkmarks on the overall plan.

   a. Periodically monitor the testing to be sure that all the intended tests are being run and that all the intended criteria are being used.

Criterion: The best index of your successfulness in accomplishing this goal will be the decreasing number of problems that occur, during and after installation, in the functional areas of the products that you were responsible for testing (i.e., problems that you have caught).

To Increase Thoroughness in Developing Integration Test Plans

Many steps need to be taken and many factors need to be checked out and taken into consideration during the development of integration test plans. Unless this preparation is thorough, the resulting integration test plan is likely to be inadequate--to require substantial revision or, if it is not scrutinized closely enough during the review process, to allow errors to go undetected until installation.

1. Meet with your manager to review all the steps that should be taken, all the bases that should be covered, in preparation for developing an adequate integration test plan. The specifics may vary depending upon the type of product you are integrating and the organization in which you work. Thus, the following suggestions are provided only to give you examples as to the types of ideas that might emerge from such a discussion.

a. Make sure you fully understand what the integration is expected to accomplish. Get clear instructions from the person who gives you the package (e.g., What does the module do? How does it go in? Where does it go in?).

b. Read the operating system installation manual that pertains to the product.

c. Become familiar with the installation procedures, verify and check out these procedures (e.g., What are the parameters of the operating system? What variables, if any, can be changed?).

d. Consider the implication of these installation procedures (e.g., How many integrations will be necessary in order to check all variables?).

e. Focus on identifying all dependencies (i.e., any equipment, system, utility or compiler-type dependencies).

f. When you have developed a preliminary integration test plan, review it with the person(s) who originally gave you the package to make sure it will, indeed, accomplish the intended purpose.

2. Write a checklist for yourself that briefly describes each of the steps you should take in developing an integration test plan.

   a. Ask your manager to review it and give you suggestions for improvement.

3. Refer to your checklist whenever you are developing an integration test plan.

   a. Cross off each step as you complete it. If you do not complete one of the steps on your checklist, be sure you can explain why it was unnecessary in this particular case. (You might also consider discussing the omission with your manager.)

   b. If you find you are doing things that are not on your checklist, revise it to make it comprehensive.

4. Be sure your integration test plan is completed and reviewed before you begin work on any system. After completing an integration, always review the plan to note its strengths and weaknesses.

Criterion: Your successfulness in practicing these suggestions will be reflected in the nature of the feedback that you receive from reviewers on the adequacy of your integration test plans. A goal you might strive for is developing three consecutive integration plans that reviewers judge to be fully adequate in all respects.

To Increase Thoroughness in Generating Test Data

A program's behavior is often a function of the sequence and combination of input data. This added complexity makes it particularly important to be thorough in generating test data.

1. Develop a list of all techniques available to aid you in constructing adequate samples of test cases.

   a. Meet with each of your co-workers to find out what methods they use and how they use them (e.g., how can decision tables be used more effectively? Which automated test-data generators are most helpful?).

2. Develop a list of criteria that you can use to evaluate the adequacy of any set of test data.

   a. The criteria should reveal whether the test data is sufficiently diverse to allow evaluation of all levels of a program/ system since, for example, test data that is adequate for evaluating the top-level structure of programs may not allow evaluation of the low-level modules.

3. Make an effort to apply these techniques and criteria whenever you are generating test data.

   a. When you have generated a set of test data that you believe to be fully adequate, ask a senior co-worker for a second opinion. Explain to them the methods and criteria that you used in constructing this data base and ask for feedback as to how you might have been more efficient. If, in your work group, a review team or your manager normally reviews the adequacy of test data, you could instead seek this additional feedback from one of these persons.

Criterion: When the persons reviewing your work approve of the adequacy of your test data for three consecutive product tests, you will have accomplished this goal.

To Become More Skilled at Recognizing Potential Problems in Products to be Tested

Hunters who are expert users of rifles but who do not know where to look for their intended prey will miss many opportunities, and waste much time on their hunting expeditions; marksmanship is only one part of effective hunting. Similarly, skillful use of automated tools and techniques such as core dumps, snapshots, and traces is only one part of truly effective evaluation. The remaining part, the part that you can continue to improve almost indefinitely, can best be described as organized thinking. As you work on increasingly more complex programs, the effectiveness with which you are able to logically analyze--to think about--potential bugs will become increasingly important. It is best to know where to look for your target before you go hunting.

1. Develop a set of general guidelines that will give you a systematic strategy for approaching most evaluation assignments. For example, you might want to:
    a. List any questions that you could ask to quickly narrow the range of potential sources of errors (that is, to distinguish between hardware and software errors, to exclude particular parts of the program, and so forth).
    b. List specific things to check on that you might otherwise tend to forget or take for granted (e.g., recent modifications in subroutines, unusual features in the input data).
    c. Establish a routine of investigating the most obvious suspects before searching for subtle problems.
2. Follow, and refine, these guidelines every time you evaluate a program.
    a. Whenever you use an automated technique, ask yourself whether you could have achieved the same result through a logical analysis.
    b. As your guidelines become more effective, you should be using more and more deductive logic in your approach to evaluation. That is, you should be systematically focusing in on the bugs through a literative sequence of logical hypotheses and mechanical tests.
3. Seek help from more experienced programmers/analysts. Just as hunters rely on native guides when hunting in unfamiliar territory, you may find it helpful to consult with the persons who developed (or previously worked on) the programs you are evaluating.
4. Always study the code thoroughly (i.e., try to become as familiar as possible with the new terrain) before you begin testing.

Criterion: When you find that you are using automated testing techniques primarily to confirm your ideas about the nature and location of bugs (that is, as tests of your hypotheses instead of a means of generating hypotheses), then you will have accomplished this task.

To Capitalize on Strong System-Testing Skills

One of the most critical but ambiguous and difficult prerequisites to planning adequate system testing is anticipating the conditions of the environment in which the product is going to be installed. You can capitalize on your strong system testing skills by helping junior co-workers become more proficient in meeting this critical prerequisite.

1. Ask yourself, "What features of the environment that a product is going into are important to consider while testing that product?"
    a. Write down these features as explicitly as possible.

   b. As you are planning future tests, check to see whether your list of features encompasses everything that you are considering; strive to make your list comprehensive.

2. Notify your co-workers that you are developing this list.

   a. Ask for their suggestions for additional important features.

   b. Offer to make the list available to them.

   c. Indicate your willingness to assist anyone who is having difficulty anticipating critical features of the customer's environment.

Criterion: When you have discussed your list with several junior co-workers, you will have accomplished this goal.

DEVELOPMENT ACTIVITIES

D. COMPUTER PROGRAM/SYSTEM/MODEL DESIGN

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To Improve at Meeting Design Standards

If you can reduce the amount of revision you have to do following reviews of your designs, you will be able to proceed with development more rapidly and reduce the deadline pressures on yourself and other project members. For these reasons and, perhaps, to reduce the number of blows to your ego that you suffer during the reviews of your designs, it is important to improve the extent to which your preliminary versions of designs meet the standards laid out in your organization.

1. Reread all the reference standards against which your designs are being evaluated.
   a. Spend some time discussing these standards with your manager, your project leader, or a senior co-worker. Strive to become fully familiar with them.
   b. Talk with the person responsible for the formal design reviews. Discuss their interpretation of the standards and how they are applied to any specific design.
2. Apply these standards rigorously and conscientiously in evaluating your designs as you are working on them and, certainly. before you submit them for review.
3. Keep an ongoing written record of all the design inadequacies detected--all the specific corrections required--by the persons who review your designs. Also, if you participate in structured walk throughs (design review meetings), include, in your records, descriptions of all inadequacies detected in other persons' designs that you did not recognize until someone else pointed them out.
   a. By analyzing these records, you should be able to identify the design standards that you are not applying consistently and/or do not fully understand. You can then take appropriate corrective actions.
4. Read over your records before you begin work on new designs. Then, while you are working on the designs, be on the alert for a recurrence of similar inadequacies. Strive to avoid having anything reappear in your records.

Criterion: As you improve at meeting design standards, you will find that you are spending less time on revisions and you probably will find that you are perceiving the entire design review process as far less threatening.

To Improve Clarity of Specifications

Coherent, effective designs are difficult, if not impossible to develop without first having clearly stated specifications. Ambiguous specifications, like incomplete specifications, create unnecessary problems during development, testing, and maintenance.

1. Ask your manager to show you examples of some clearly stated specifications and some ambiguously stated specifications. Discuss the specific differences between these two sets of specifications.
2. Develop a list of characteristics that distinguish clearly stated specifications from ambiguous ones. Review this list with your manager or a senior co-worker and revise it to incorporate their suggestions. Type this final list on a sheet of paper so that you may continue to refer to it.
3. Each time you prepare a set of specifications, evaluate your first draft against your checklist. On a scale from one to ten, rate the overall clarity of your specifications. Be objective: this rating is for your eyes only. Record your rating, along with a brief narrative justification, summarizing major strengths and weaknesses on an index card. Date the index card and file it away. Finally, revise your rough draft of the specifications so that the new version would, in your eyes, warrant a rating of at least nine out of ten for overall clarity. If you wish, you may seek assistance on the revision from your manager or the senior co-worker.
4. Periodically review your index cards to identify the more consistent weaknesses in your rough drafts of specifications. Set yourself the goal of improving at least one of these characteristics the next time you prepare a rough draft of some specifications. If you cannot meet this goal on your own, seek assistance from your manager or senior co-worker who helped you previously.

Criterion: When you have assigned overall clarity ratings of nine out of ten to your rough drafts of three consecutive sets of specifications, and eliminated all of your previously consistent weaknesses, you will have been successful.

To Improve at Specifying Input Conditions and Interfaces

Anticipating all possible input conditions is a fundamental prerequisite to establishing adequate design requirements. Also, in cases where the data consists of interfaces between modules, adequate design of the modules demands careful examination and specification of those interfaces.

1. Plan to use decision tables, Chaipin Charts, or some other formalized technique during the early phases of the next three designs that you work on. If you are uncertain as to which of these formalized techniques to use, or how to use them, seek advice from your manager or project leader.
2. Discuss your plan with your manager or project leader. Seek suggestions as to how you can ensure that you are applying the technique in the most effective manner. Set a series of specific follow-up dates for evaluating your successfulness in applying the technique and its effectiveness in enhancing the thoroughness of your designs.
3. Follow through on your plan. When you have your periodic meetings with your manager or project leader, be sure to inform them of any difficulties you are encountering and seek further advice.
4. Keep track of the feedback you receive concerning these three designs during the design walk through or other review processes for these projects.

Criterion: If, during the design reviews, you are receiving fewer criticisms than usual concerning your thoroughness in specifying input conditions and interfaces, then you will have successfully completed this task. A truer index, however, of your continued progress towards this goal will be the number and nature of the bugs detected in your modules during integration and evaluation.

To Improve Programs' Logical Structure

It is important to design logical, well-structured programs that can be readily understood by others. If each module in a program can be understood simply in terms of its input and output values (that is, if each module is isolated from changes in other modules), then the entire program is likely to be easy to understand.

1. Test the modular structure of your programs by drawing blocks around each of the logical units. The more distinct and nonoverlapping these blocks are, the more highly modular and understandable is your program structure. Unless very short, a program that has few blocks or many overlapping ones is poorly structured.
2. Also test the general top to bottom flow within your programs: is there more than one entry point or exit point; are there any GOTOs in the middle; and so forth.
3. Whenever you design a program, check each module to see whether it can be fully understood in terms of only its input and output values. Be sure to check for, and then eliminate if possible:
   a. Any transfer of control into or out of the code within a module
   b. Any internal reference to variables common to several modules
   c. Any internal reference to modules that input new values from an external device
4. Whenever you decide that data connections between modules are necessary within your program, ask a senior co-worker for a second opinion. If they disagree, redesign those modules to eliminate the data connections.
5. If your work tends to be restricted to the design phase, make an effort to follow your designs through to completion. You can get additional feedback, for example, by checking on and taking what is applicable from, the feedback that the coders are getting concerning the structure of the programs you designed.

a. Communication with the programmers who follow-up your designs is extremely important for maintenance and improvement of design quality.

Criterion: Your success in applying these suggestions should be reflected by an increase in the amount of positive feedback concerning the structure of your programs you receive from design reviews and from the programmers who work on your designs.

To Increase the Simplicity of Your Designs

As long as all desirable capabilities can be maintained, the simpler and more straightforward a design, the less programmer time is required for coding, testing and debugging, and the easier it will be to maintain and update.

1. Examine every module or subroutine you design to identify and revise all sections that can be further simplified. Set yourself the goal of finding at least one design. If you cannot find any section that warrants simplification, ask a co-worker to examine the module and give you their ideas as to features that warrant simplication. (Do not eliminate cost-justified, complex features in order to achieve simplicity, but do strive to write them in the most straightforward possible manner.)

2. Ask programmers who are testing your programs to tell you whenever they find some section that could have been written much more simply. Keep a notebook to record their comments so that you can later look over these notes to see whether there are particular circumstances in which you seem to produce unnecessarily complicated designs and/or use unnecessarily esoteric programming features. Then be alert to the occurrence of these conditions and, when you run across them in the future, be especially careful to scrutinize the designs you write.

3. To monitor the advantages of simplifying your designs, you could keep track of the following:

   a. The average number of debugged statements you generate per day now that you are writing simpler designs, as opposed to before you began this task. (It should be increasing.)

   b. The number of bugs discovered in your programs during evaluation. (It should decrease as you become more and more proficient at simplifying your designs.)

   c. The simplifications that you did not detect when reviewing your own designs but were detected and recommended by your co-workers. (The frequency of repetition of similar types of unnecessary complexities should be decreasing.)

Criterion: When you have designed three consecutive modules that you and a co-worker judge to be free of any features warranting further simplification, you have been successful. Other indices of your progress could be the decreasing number of simplifications introduced into your modules during design reviews, and the increasing number of simplifications you are able to suggest to others during structured walk throughs of their designs.

To Capitalize Upon Strong Design Skills

During periods when you are devoting most or all of your time to the integrating/testing phase, you may wish to continue to exercise your strong design skills.

1. Generate a plan whereby you could use a portion of your time to assist project teams that are currently in the design phase. You might offer, for instance, to review and critique rough drafts of ERS documents, or ask to be included more frequently in design walk throughs. Make sure your plan provides for adequate performance of your regular activities.

2. Meet with your manager to obtain their consent to act upon your plan and to work out the details for implementation.

Criterion: When you are able to continue exercising your strong design skills even when these skills are not directly called upon by your major work assignments, you will have accomplished this goal.

To Write More Complete Specifications

If your organization has not laid out standards as to what should be included in design specifications, it is important for you to develop your own standards. When you write system/program specifications, you are defining the problem that the eventual system/program must solve. If something is left unspecified in the original definition, unnecessary problems will occur during development, testing, and possibly even maintenance of the system/program.

1. Prepare a list of all the specific items that are necessary and desirable to include in the specifications that you write. For example, complete program specifications would need to include at least the following:

   a. The format of the input and output

   b. Initial conditions and default conditions

   c. Definitions of all possible exceptional conditions

   d. Specified treatments for all exceptional conditions

2. Discuss your list of items with your manager or a senior co-worker as well as some of the persons who are responsible for programming your designs. Decide whether there are any additional items that should be included and whether there are any items that are too broad and should be broken into several separate items. In the end, your list should enable you to determine whether any set of specifications that you write is complete in all respects.

3. Whenever you write program/system specifications, use your list of items as a checklist to determine whether or not your specifications are complete.

Criterion: When you have written three consecutive sets of specifications that contain all items on your list without requiring any further revisions, you will have completed this task.

DEVELOPMENT ACTIVITIES

E. COMPUTER PROGRAM/SYSTEM/MODEL DEVELOPMENT

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To Become More Effective at Meeting Coding Standards

To reduce the amount of time you spend revising your code, you need to become more effective at writing programming code in conformance with the standards adhered to in your organization.

1. Reread all the standards that your programming code is expected to meet.
2. Spend some time discussing these standards with your manager, your project leader, or a senior co-worker. Be sure you are aware of all the applicable standards and then strive to become fully familiar with them.
   a. Meet with the person responsible for formal code reviews. Discuss their interpretation of the coding standards and find out how they are applied to any submitted code.
3. Try to routinely apply and check your code against these standards as you are writing it. Then, before you submit any code for formal review, evaluate it as rigorously as you can and correct all the inadequacies you detect.
4. Keep an ongoing, written record of all changes in your code considered necessary by the reviewers. (If standard code review forms are used in your organization, simply file these forms in a readily accessible place.)
   a. Develop a system for classifying the criticisms you receive on your code; for example, commenting criticisms, structure criticisms, format criticisms, and so forth. Your classifications should be fine enough to allow you to pinpoint the types of errors you are, and are not, making with some consistency.
5. Tabulate the types of criticisms you receive every time a code review is conducted. Keep a running total.
   a. Whenever you see that you are making one type of error repeatedly, retrieve and reread all the comments the reviewers made in connection with these criticisms.
   b. This should enable you to identify the coding standards that you are not applying consistently and/or do not fully understand. You can then take appropriate corrective action (e.g., be especially alert to these types of problems in your code while you are writing and evaluating it; meet with your manager for further explanation as to how to apply these standards; etc.).
   c. Set monthly goals for yourself: specify the maximum number of corrections that you will consider acceptable in each classification. Strive to meet or exceed these goals. If you think it would help motivate you, you might keep your manager or a co-worker informed of your goals and your success in meeting them.

Criterion: Your progress towards becoming more effective at meeting coding standards will be reflected in the amount of time you need to devote to revising your code and, perhaps, in your attitude toward the code review system as a source of helpful feedback--something that is useful to you rather than simply a thorn in your side.

To Become More Effective at Understanding Existing Programs

The more fully you understand the module/program that you are modifying, the better able you are to anticipate and take into account all the implications that your modification will have for the program as a whole.

1. Whenever you are given responsibility for modifying a program/module, take steps to ensure that you fully understand the original program before you introduce any changes.
   a. Outline on paper the algorithm inherent in the program you are modifying; draw your own high-level flowchart.
   b. When you have an idea as to the modification you think will work best, be sure that it fits into the overall flow; then somehow indicate or list all the possible peripheral effects that your modification might create.

   c. Meet with the person in your organization who is most familiar with the entire program. Make sure that your idea does, indeed, fit into the basic philosophy of the program. Then, if it does, find out whether you have considered all the probable implications in sufficient depth to begin making changes in the program.

Criterion: Your success in reaching this goal will be reflected by the decreasing number of unintended and undesirable effects that your modifications create in the programs on which you are working.

To Improve Analysis and Algorithm Development

It is as important to minimize the time you spend writing code as it is to minimize the executing time of the code you write. You can shorten programming time by reducing the number of false starts you make while coding. The more effectively you analyze the requirements and final constraints of a program module, the fewer false starts you will make.

1. Whenever you are given responsibility for programming a module: study the requirements of the program module and gather all information regarding external constraints on the module, then consider alternative ways to solve the problem before you begin coding.

   a. Write a brief outline or prepare a flowchart of at least two alternative algorithms.

   b. Discuss your alternatives with a co-worker or senior programmer. Ask them to point out how you might enhance the algorithms, whether there are any potential problems that you have missed, and to suggest any algorithms that might be more effective than the ones you have been considering.

   c. Choose and refine the best algorithm from among these alternatives. Write out in some detail the logic of this algorithm.

Criterion: When you are able to code your modules without making any substantial refinements in the algorithms that you are following, you will have accomplished this goal.

To Write More Efficient Modules

While it is important to write clearly structured modules, and clarity and structure considerations alone will often yield desirable decreases in executing time, it is still important to be alert to ways in which program efficiency can be increased.

1. Prepare a general list of "do's and don'ts" you can follow to write more efficient code.

   a. For example: Do use intermediate variables so that quantities required for several statements are computed only once; don't compute a constant within the body of a loop.

2. As you write new program codes, count the number of "do's and don'ts" that you are breaking.

   a. Try to revise your code to eliminate as many of the violations as possible without sacrificing clarity or structure.

   b. Aim to reduce the initial number of violations with every module you write.

3. If appropriate in your work group, periodically ask a co-worker to review your code and to suggest ways to make it more efficient.

Criterion: As you practice these suggestions you should find that the modules you code become increasingly efficient in terms of executing time while maintaining quality in terms of clarity and structure considerations.

To Increase Speed of Coding

While efficient use of machine time and memory space are important considerations in programming, it is also important that you do not sacrifice your own efficiency while striving to make your programs efficient.

1. Keep a rough estimate of the number of debugged statements you generate each day. This record will be for your eyes only and will give you a basis for gauging your own progress. At the end of each week, calculate the average number of debugged statements you generated per day.

2. While coding, keep the following guidelines in mind:

   a. Rather than trying to make every subroutine optimally fast, identify and concentrate on those that are executed most often. This way you can continue to minimize your use of machine time without taking an undue amount of your own time.

   b. If memory space is a critical consideration, estimate in advance the sections of your program that will be the largest and then spend the bulk of your time trying to reduce these. Or, if you have time, first write the program in a reasonable, straightforward manner, and then determine where the greatest savings can be made.

   c. The complexity of a module will influence the speed with which the module can be thoroughly checked out and hence the amount of code can be debugged each day. Because thorough initial testing will speed software integration and reduce bugs in the final product, thoroughness should never be sacrificed to speed. If you have difficulty balancing throughness against speed when working on any particular module, seek advice from your project leader or manager.

3. Seek regular feedback from your manager or an experienced co-worker as to the efficiency of your programs in using machine time and memory space. Do not let the efficiency of your code slip below acceptable levels. Similarly, do not increase your speed at the expense of increasing your error level. If either seems to be occurring, do not attempt to increase your coding speed any further until you seek advice from your manager.

Criterion: Your success in applying these suggestions will be reflected by an increase in the average number of debugged statements that you generate per day.

To Reduce the Number of Bugs in Your Written Code

The more bugs you can detect and eliminate while you are writing code, the faster and easier it will be to test, debug, and maintain that code.

1. Comment and document your code as you are writing it instead of waiting until afterwards.

   a. If you are at all reluctant to do all your documenting during coding, make a list of the positive effects you find to be associated with writing documentation while coding. For example, as Yourdon suggests in Techniques of Program Structure and Design, you are likely to find that while trying to describe your program in plain English, you were forced to reexamine the basic workings of the program and, hence, perhaps to uncover assorted inadequacies, and unnecessarily esoteric features. This, in turn, should give you the opportunity to substantially improve the program before turning it over for integration and evaluation.

   b. After you have generated your own list of advantages, you should be more convinced about the value of documenting while coding.

2. If you have difficulty documenting while coding, meet with your manager or project leader. Describe the problems you have encountered and ask for advice as to how you can overcome them.

3. Do not sacrifice the thoroughness of your initial testing to speed. If you have difficulty balancing the pressures against thoroughness on any particular assignment, seek advice from your project leader or manager.

4. Over the next 2 to 3 months, keep records of the number and nature of the bugs detected in your modules after they leave your hands. Aim to avoid letting the same type of bug slip through more than once or twice. Also, keep records of the number and nature of the bugs you are detecting and eliminating during implementation. The ratio of the number of bugs caught by you to the number of bugs caught by others should be increasing with every module you write.

Criterion: When the ratio of the number of bugs in your modules you have caught compared to the number others have caught increases by 100 percent (doubles), you will have been successful.

To Improve Effectiveness in Writing Program Modifications

One of the major difficulties in modifying an existing code is the occurrence of numerous unintended changes in other portions of the program. Thus, cautiousness is often the key to effective enhancing and correcting of existing programs.

1. Develop a personalized set of rules to follow in writing modifications to existing programs. The following suggestions are examples only; they may not be appropriate within the context of the formal standards of your organization.
   a. Ignore coding details until you are familiar with the overall flow of control of the program.
   b. Always indicate on the listing which instructions you have changed.
   c. Never use variables that already exist in the program if you can insert local variables instead.
   d. Insert error-checking all around the code you insert or modify.
   e. Before changing any function or subroutine, make sure you have searched and accounted for any effects they have on other parts of the program.
2. Follow your rules every time you modify an existing program.
   a. Revise or expand the rules based on the bugs that you find yourself creating when writing program modifications.
   b. Strive to develop a set of rules that will allow you to write error-free modifications.
3. Keep a rough record of the amount of time you are spending debugging programs after you have modified them.
   a. Estimate the average time you spent debugging your first three modifications; use this as a base rate for evaluating your future effectiveness.

Criterion: If you take complexity and your familiarity with the modules into consideration, your success in following this suggestion will be reflected by a continued reduction in the number of unintended changes that your modifications create.

To Capitalize on Your Efficiency in Programming

Your efficiency in writing programming code and feature modifications probably results at least partly from your skill in adapting your programming approach to fit the particular problems you encounter. You can further enhance your efficiency by explicitly formulating the rules that you follow in choosing the approach to fit the problem.

1. Whenever you are working on a program, keep a record of the actual steps that you go through.
   a. Make note of what you do, how long it takes, and why.
   b. Keep this record in a notebook; allow one section for each program.
   c. Record what actually happens; do not try to make your records resemble textbook approaches.
2. After you have accumulated records of the approaches that you have taken to five programming problems, begin to look back over your records to identify any differences among your approaches. For example, did you sometimes take the same steps in a different order (follow a bottom-up instead of a top-down approach)? Did you sometimes start writing code immediately, and so forth.
3. Develop a list of the major variations in your approach to programming.
4. Decide what conditions led you to take one approach instead of another. That is, decide what implicit guidelines you have been following in choosing among these different approaches.
5. Evaluate these implicit guidelines. Have they always led you to choose the most effective approach?
6. Write explicit guidelines that you can follow in the future to make the best possible choice among alternative approaches. Consider sharing these guidelines with your co-workers and your manager.
7. Continue keeping these records and doing these analysis until you are satisfied that you have identified all major variations in your approaches to programming.

Criterion: When you have identified all major variations in your programming approaches and have explicitly identified the type of problem for which each approach is most appropriate, you should find that you are able to write programming code and feature modifications in a more consistently efficient manner than before, and you will have completed this task.

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DEVELOPMENT ACTIVITIES

F. REPAIRING PROBLEMS

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To Improve Confidence and Reduce Reluctance to Work on Complex Problems or Unfamiliar Equipment

One of the problems that every inexperienced customer service specialist must deal with is that of getting over the fear of making mistakes and gaining the confidence to tackle more complex problems. To help your progress despite that fear, follow this procedure:

1. Sit down with your technical specialist and list the different duties you will eventually be handling, including all the different types of repair work you will be called upon to do when you are fully up to speed.

2. With the technical specialist write up a tentative timetable for the next 6 months listing the dates by which you should be able to handle each responsibility and each type of repair work. Discuss the process by which you will be eased into these assignments (for example, read the manual, observe an experienced customer service specialist at work on that particular piece of equipment, work on the equipment yourself under the supervision of a more experienced service specialist, and handle such problems yourself.) Write these preliminary steps into your timetable as far as this is possible.

3. Monitor your progress by comparing your timetable with what you are actually doing on the job. If the pace set by your timetable is uncomfortable for you (if you feel you are moving too fast or too slowly), discuss this with the technical specialist (or with your manager) and get some special help or renegotiate your timetable.

Criterion: If you adhere to your timetable, you will be making acceptable progress toward becoming a fully functioning customer service specialist.

To Increase the Number and Complexity of Repairs Made

Charting your repairs provides you with a yardstick for measuring progress in this area.

1. Over the next month record each repair made, what tools and materials were used, and how much time was required.

2. With your manager analyze the improvements that could be made in terms of problems of increasing complexity, efficiency of repair, and lack of subsequent malfunctions in the same piece of machinery.

3. Define areas of weakness that might be remedied through increased know-how or practice and design a plan to implement them. This plan might include demonstrations, troubleshooting practice, or readings.

4. For repairs made on equipment that has already been worked on, determine if more adequate repair or maintenance on the first attempt might have prevented subsequent malfunction.

Criterion: An increase in successful attempts at more complex repair problems, as well as a decline in breakdown of equipment already repaired, should result from following this suggestion.

To Get the Greatest Benefit From Repair Experiences

Much of what distinguishes one highly skilled at repairing problems from one less skilled can be labeled experience. Unfortunately, gaining experience is a very slow and unsystematic process. You, can however, work to get the greatest possible benefit from your experience.

1. Turn each call into a learning experience by concentrating on the equipment as a fully functioning whole. That is, rather than taking a cookbook approach to maintenance and repair, try to develop a conceptual understanding of the way the equipment works and what goes wrong when it does not function as it should.

2. Carry a notebook with you on the job, and make a note of problems you have difficulty resolving and of any questions that arise in your mind about the equipment.

3. In your idle time, refer to manuals, logs, etc in order to answer those questions or resolve those problems you have jotted down.

4. Use these notes as a reference when similar circumstances arise on your future maintenance and service calls.

Criterion: If you are conscientiously following this procedure and getting the greatest possible benefit from your repair experiences, you will notice a reduction in the number of repair problems and questions you have.

To Improve Use and Knowledge of Tools in Repair

The ability to accomplish successful repairs requires adequate knowledge and familiarity with tools and instruments used in the repair process.

1. List the tools and instruments available to make repairs. Rate your familiarity with the item by indicating whether they are proficient in the use of the item, have some knowledge, or are unfamiliar with how to use the item.
2. Over the next month devote time to increasing proficiency with the items on the list. In cases where help is needed, obtain necessary resources in the form of training or written material.
3. Demonstrate your ability to use certain tools or instruments.

Criterion: When 75 percent of the items previously labeled unfamiliar now belong in the middle category and one-half of the items previously in the middle category are now in the proficient category. this suggestion will have been completed.

To Increase the Permanence of Repairs Made

Good repairs are ones that last. Often the repair person must go beyond the presenting symptom to ensure that a malfunction in the same part or a related part will not occur.

1. Over the next month when a problem occurs determine what might have been done differently the last time it was repaired.
2. When you make the repair note it on the unit so that the next time a problem occurs the person doing the repair will have more information.
3. If a unit breaks down after being repaired, determine what could have been done differently. With appropriate permission, implement this when repairing the unit.

Criterion: Following this suggestion should result in a significant increase in time between repairs.

To Improve the Thoroughness and Effectiveness of Housekeeping Efforts

Housekeeping tasks, though not directly related to restoring the equipment to working order, go far toward minimizing future problems and maximizing the effectiveness of the actual repair work. Typically, however, these housekeeping tasks become such a routine part of the experienced customer service procedure that they would have difficulty describing for you exactly what housekeeping tasks they perform. Before you can add such tasks to your own maintenance and repair repertoire, you must become aware of what they are. To help you gain this awareness:

1. Ask your manager or technical specialist to pair you up with a customer service specialist whose responsibilities are similar to yours and who is seen as especially effective at repair and its housekeeping aspects.
2. Sit down with this individual and ask them to try to list all the things they do on a call beyond the minimum necessary to restore the equipment to working order. Take notes during this discussion and afterward write up a list of housekeeping tasks for each type of equipment you service.
3. Spend one day accompanying this customer service specialist on maintenance and service calls. Think about your own routine as you pay close attention to everything this individual does and to the degree of thoroughness with which they perform each task. Take notes, while you observe, on anything they do that is not presently a part of your own routine. Ask questions about any procedure for which you do not see the necessity.
4. At the end of this day, use your notes to expand your initial list of housekeeping tasks into a separate Checklist of Things to Do for each type of equipment you service.
5. Review these checklists with the customer service specialist you observed and your manager. At this session, discuss the importance of each task and raise any questions you have about the value or efficiency of any of the tasks.
6. Carry these checklists with you on the job and refer to them on each maintenance or service call to ensure that you have been thorough in taking care of your housekeeping responsibilities.

7. After you feel familiar with the checklists, begin working without referring to them until after the job is done. Then check to see how many of the tasks on the checklist you remembered to do.

Criterion: Continue to check yourself after every job until you are remembering to do at least 95 percent of the tasks on your list. You will then have increased the thoroughness of your housekeeping activities and, in turn, minimized the number of future equipment problems.

To Decrease Call-Backs and Customer Complaints

Indicators of less than optimal repair work include: call-backs, customer complaints, emergency calls, and equipment removals.

1. For the previous month, obtain from the logs a tally of the number of call-backs, customer complaints, emergency calls, and equipment removals where you were the last customer service specialist on that equipment.

2. Write a brief description of the circumstances surrounding each incident, and for each entry write one action you could have taken that might have staved off the problem.

3. Look for recurring circumstances among the incidents on your list. For example, is one particular type of equipment involved in several cases, does one particular mechanical problem arise more than once, is insufficient customer knowledge involved more than once?

4. List the three difficulties that arose most frequently. Where you do not have three recurring circumstances, list those difficulties that resulted in the greatest cost to the customer or to your organization.

5. In each of these three recurring or costly problem areas, arrange to get some special training or assistance. For example, if one piece of equipment is involved more than once, arrange to have a technical expert more knowledgeable about that piece of equipment discuss it and your problems.

6. On the basis of this special training and your earlier notes, prepare a summary of Things to Avoid and Things to Remember that should decrease your call-back and complaint rate. Refer often to this summary and incorporate those principles into your day-to-day work.

Criterion: When the number of call-backs, complaints, emergency calls, and equipment removals in your area for 1 month is substantially lower than the number during the month preceding this development activity, you will have successfully met your goal.

To Reduce Time Spent Repairing Problems

One important indicator of the efficiency with which you repair problems is the amount of time that elapses between the time you begin repair work and the time you complete the work.

1. For the next week, carry a notebook with you and record the exact times:

   a. You begin maintenance or repair work

   b. You complete the work and leave the equipment site

2. Keep separate lists of emergency calls and maintenance service work. At the end of each day, compute the amount of time spent on each call and the average amount of time spent per maintenance call for the day and per emergency call for the day (add up the amount of time spent for all calls and divide by the number of calls). At the end of the week, calculate the average amount of time per emergency call for the week and the average time for maintenance work.

3. On another sheet of paper, list the three maintenance jobs and the three emergency calls on which you feel you made least efficient use of your time. Then for each of those six entries, list at least two ways in which you could have cut the amount of time spent. For example, consider whether more efficient organization of your own materials would result in decreasing your unproductive time; or perhaps a more systematic way of handling your own paperwork would save you time; or brushing up your technical skills with regard to a particular piece of equipment.

4. Review your figures and your proposals for saving time with your manager. Work out a plan to implement your proposals or others that your manager might suggest.

5. After your plan has been in effect for at least 2 weeks, check on its effectiveness by again recording your start and finish times for at least 1 week.

Criterion: If the average time spent per maintenance and emergency call for this week is significantly (as determined by you and/or your manager) less than the time spent before your plan went into effect, you will have successfully carried out this development suggestion.

To Improve Efficiency in Repair Functions

Good repairs are not only thorough and long-lasting; they represent efficient use of time and material.

1. Over the next month whenever you make a repair, note the amount of time and material expended on the project.

2. After the repair is completed, write a plan for accomplishing the objective that would have been more efficient.

3. Before beginning a repair, list two or three alternative plans for accomplishing the goal. Justify in writing your choice on the basis of efficiency. The time and materials required to accomplish the repair should be estimated and compared with actual expenditures when the repair is completed.

4. Review the month's repair record with your manager to determine what reoccurring problems exist. Look at the plan implemented in light of the alternatives and suggest improvements.

Criterion: In the following month the time and materials expended for repairs should be reduced substantially from the previous month. The amount of time and materials expended should fall within 10 percent of the original estimate in 90 percent of the cases.

To Improve Procedures

Repairing problems when they arise is often the most inefficient way to keep things running smoothly. Changes in technique or procedure can prevent some problems from occurring in the first place.

1. During the next 2 weeks choose two areas of functioning or pieces of equipment and detail a plan for better operating procedure. Choose an area that will contribute to your personal development as well as benefit the organization.

2. Review this plan with your manager and suggest changes necessary for implementation.

3. Evaluate the result of the changes after an appropriate amount of time.

Criterion: Implementing this suggestion should result in a significant increase in task or equipment efficiency.

To Make Improvements in Nontechnical Areas

In addition to improving specific methods and procedures, changes can be implemented in organizational and other work-related factors.

1. Suggest ideas for change for aspects of your job functioning that go beyond the technical aspect of your work. This can have the result of increasing motivation as well as improving job functioning.

2. Choose a suggestion that has practical merit and work up the idea into a plan that can be implemented. Be sure that the plan details the anticipated results (both positive and negative) and establishes criteria for evaluation.

3. Implement and carry out the evaluation function with your manager.

Criterion: When a plan has been developed, implemented, and evaluated this suggestion will have been completed.

To Further Increase Repairing Skills

Because you have demonstrated proficiency in repairing equipment within your job area, it will aid in your development to gain further experience in repair work.

1. Attempt more complex repair problems than normal. This may require increased knowledge of equipment through training or reading.

2. Assist someone skilled at equipment repair in the actual repair. By apprenticing to a skilled person you will develop expertise in this area.

3. Seek outside training in the repair of the equipment that is used on the job. This may be theoretical or more hands-on courses.

4 Assume greater responsibility for the functioning of equipment, including repair and normal maintenance procedures.

5. Be available as a consultant to others who are experiencing difficulty or are in need of someone with well-developed repair skills.

Criterion: Completing any of these suggestions should result in increased proficiency of repair functions.

To Develop Skills Through Sharing With Others

Another way to develop repair skills is to function in a teaching capacity. This will not only further improve skills but will be an asset to the organization.

1. Train another employee in repairing equipment, choosing problems of appropriate complexity for you and the student.

2. Share repairing skills in presentation or written form. Informal seminars might provide the opportunity for employees to share knowledge and skills. Another way would be a monthly newsletter or single sheet describing the repair process.

3. Attend seminars or training sessions in equipment repair and share this experience with others.

Criterion: Completing this suggestion will result in your putting skills and knowledge into practice by improving the capabilities of others.

To Capitalize Upon Strong Housekeeping and Repair Skills

Employ your strong skills [illegible] repairing and housekeeping to help others less skilled in this area.

1. Serve as the model for another employee who wishes to improve skills in this area and use the experience to more completely define in your own mind the factors that contribute to effectiveness.

2. After the experience, prepare a handout on housekeeping hints. List those extras that make your repair work more thorough, more complete, and more permanent than that of an employee who does only the minimum necessary to restore the equipment to working order.

3. Review this handout with your manager and ask for their input before distributing it to other customer service specialists.

Criterion: After successfully developing a housekeeping handout and distributing it to others you will have completed this activity.

To Capitalize Upon Your Skill at Repairing Problems

Use your strong skills at repairing problems to benefit your customers and your organization. Be on the lookout for equipment design problems.

1. With your manager set a goal for yourself. Decide upon a particular number of authorized repairs you could reasonably be submitting per a unit of time.

2. Keep this goal in mind as you carry out your day-to-day equipment repair responsibilities.

3. At the end of the specified time period, determine whether you have met your goal, and, if necessary, renegotiate the goal for the next 6 months with your manager.

Criterion: When you have set 3 goals for yourself and met them successfully you will have completed this activity.

DEVELOPMENT ACTIVITIES

G. SAFETY AND MAINTENANCE

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To Capitalize Upon Maintenance Skills 254

To Capitalize Upon Housekeeping Skills 255

To Improve Safety Practices

Safety should be of prime concern in the work areas. Often safety violations are overlooked in the pursuit of job goals and bad safety habits become commonplace.

1. Conduct a safety assessment of the work area to determine whether improvements could be made. Note potential problems and steps that could be taken to remedy them.
2. With your manager's help, develop an equipment safety procedure checklist. For the following month, refer to this checklist until practices that violate safety standards are eliminated.
3. At the end of the month, conduct a reevaluation with your manager to determine whether the safety practices have resulted in lasting changes and if new problems have arisen.

Criterion: Following this suggestion should result in a significant decrease in safety-related problems and practices.

To Prevent Problems From Recurring

While a perfect safety record is the ultimate goal, accidents can be utilized to help you gain insight about weaknesses in personal safety practices and how these weaknesses might be overcome.

1. When a safety-related problem does arise in the organization, write a detailed description of how the mishap occurred.
2. Write a critique of your accident report, making comments and suggestions as to how this situation could have been prevented and how to minimize the chances of a future occurrence.
3. Review personal comments and suggestions daily with the intention of making the preventive actions part of the daily routine.

Criterion: If at the end of 2 weeks, you and your manager are satisified that new safety practices have been incorporated into daily performance, the requirements of the suggestion will have been met.

To Spot Potential Problems Early

Remember "an ounce of prevention . . ." Developing an attitude of anticipating problems can prevent more serious ones from occurring.

1. In the next 2 weeks, conduct an assessment of your organization and submit a written report of potential safety problems and possible steps to remedy them.
2. Review this list with your manager and implement suggestions that are both necessary and practical.

Criterion: A listing of four potential problems and adequate solutions for them will indicate completion of this suggestion.

To Improve Safety Practices Through Increased Competence

Safety problems can arise from improper training or lack of knowledge about correct operating procedures. If you are having safety problems with equipment, unfamiliarity with the equipment is a probable cause.

1. Whenever possible, obtain supervision for unfamiliar equipment until proficiency has been established.
2. Ask for a co-worker who has demonstrated proficiency in operating the equipment in question. This co-worker should demonstrate the operation of the equipment while you note proper procedures, underlining those areas in which your performance differs from your co-worker's.
3. The next time you operate the piece of equipment, review the notes paying particular attention to the procedures underlined. If uncertain about any aspect of this, consult co-worker before beginning to work with the equipment.

Criterion: When you are able to safely and efficiently operate the equipment without requiring assistance, the requirements of this suggestion will have been completed.

To Improve Housekeeping

Improper housekeeping is the cause of many occupational accidents; this is particularly unfortunate because they are among the easiest to prevent.

1. Develop an attitude that cleaning up is part of any task involving materials and/or apparatus. When you report that a task is completed, check that adequate clean-up has been done.

2. Know what standards are expected in regard to housekeeping; this will set a goal toward which to work.

3. When working with hazardous materials, use protective equipment and isolate the hazard to the greatest extent possible.

4. Routinely take 5 to 10 minutes at the end of the workday to ensure that things are properly stored. Once a week for the next month ask your manager to conduct a check of your work area to determine what improvements in housekeeping could be made.

Criterion: Following this suggestion will result in increased neatness and minimization of safety hazards.

To Improve Tool and Equipment Storage

Storing equipment properly will help you and others perform job duties more efficiently and prevent accidents caused by carelessness.

1. Devote time after completing a task, and at the end of the work day, to store all tools and materials properly. Have your manager check periodically to see that standards are being met. Provide feedback immediately so you may correct mistakes.

2. Reorganize or create better storage facilities for tools and equipment.

Criterion: Following this suggestion should result in a significant reduction in improperly or inadequately stored tools.

To Reduce the Incidence of Horseplay

One of the most avoidable causes of accidents is horseplay or fooling around with dangerous materials.

1. Develop an awareness of the problem and a sense of personal responsibility should roughhousing result in an accident.

2. Stop and think of the consequences the next time you are tempted to join in roughhousing. Imagine the possible consequences of such action.

3. In addition to monitoring personal behavior, as a safety conscious employee you should serve as a deterrent for similar behavior on the part of others.

Criterion: Following this suggestion should eliminate incidents of horseplay in the work area.

To Improve Maintenance Functions

Developing better maintenance skill will result in savings of both time and money. The good employee is one who performs routine maintenance as part of the job function.

1. For the next month, keep a record of maintenance functions that are attempted.

2. Over this month, obtain instruction or training to extend the range and complexity of maintenance activities that you can attempt.

3. Develop maintenance schedules for pieces of equipment that are used. Before implementing the plan, however, review the schedules for completeness and accuracy for the employee.

Criterion: Following this suggestion should result in a significant increase in the number of maintenance functions that are accomplished.

To Capitalize Upon Maintenance Skills

When you have demonstrated proficiency at maintenance functions, sharing skills and opportunities for development of new ones will represent efficient resource utilization.

Over the next month:

1. Share knowledge of equipment maintenance through oral presentations or a written medium.

2. Train another person in maintaining a piece of equipment or orient a new employee to the organization.

3. Seek expanded knowledge through reading and courses or seminars in the maintenance of equipment.

4. Use individual skills in maintaining equipment that would not normally be your responsibility.

5. Work with persons skilled in maintenance functions.

6. Develop maintenance logs for the equipment in the organization. Regular maintenance procedures can then be documented by keeping these logs up to date.

Criterion: Following this suggestion will result in increased proficiency of maintenance functions and/or a sharing of knowledge with others.

To Capitalize Upon Housekeeping Skills

Your exemplary performance in this area should be recognized and used as a model for other employees.

1. Use personal talents by making suggestions about changes in departmental housekeeping policies.

2. Encourage sharing of ideas in this area by circulating a newsletter or posting a bulletin board with helpful hints.

Criterion: Continued superior performance and the distribution of knowledge will be the results of following this suggestion.

ADMINISTRATIVE

1. Planning and Evaluating

On-The-Job Development Activities

1) To ensure planning is detailed enough 126
2) To minimize the number of changes once a plan is implemented 136
3) To ensure plans that require the assistance of others are possible to carry out 129
4) To ensure that the plan you choose is the best one available 126
5) To list strengths and weaknesses in specific, concrete terms 136
6) To ensure that the goal or problem is clearly defined 125
7) To improve daily work scheduling 130
8) To avoid losing sight of the original goal 125
9) To meet project deadlines through backward planning 131
10) To include adequate evaluation along with your planning 135
11) To evaluate your planning 135
12) To determine what time of day is best for planning 126
13) To eliminate interruptions in your planning time 125
14) To ensure that work proceeds in your absence 87
15) To minimize last-minute decision making 132
16) To gain practice in the planning process 129
17) To distinguish between standing plans and single-use plans 135
18) To increase flexibility in work planning 136
19) To further improve your planning skills 138
20) To extend your planning expertise by working with others 136
21) To gain further expertise in planning through observing and working with others 136
22) To extend your planning function outside of normal job responsibilities 138

2. Work Organization

On-The-Job Development Activities

1) To ensure that everything you need to perform your job is readily available 149
2) To improve daily work scheduling 130
3) To more effectively utilize your time 131
4) To assess time spent on a specific project 130
5) To minimize the amount of time taken on specific tasks 129
6) To avoid losing sight of the original goal 125
7) To prevent your lack of organization affecting others 150
8) To avoid boredom and develop more enthusiasm in carrying out tasks and assignments 7
9) To locate materials more quickly 150
10) To better organize materials in your organization 150
11) To avoid missing important information in memos and reports 192
12) To facilitate future planning and avoid crisis situations 142
13) To avoid others losing trust in you 137
14) To improve the accuracy of your work 33
15) To gain further practice in your work organization 138

3. Crisis Action

On-The-Job Development Activities

1) To ensure that employees are clear about what is expected of them 184
2) To avoid crises by periodic assessment 183
3) To avoid crises by following up assigned work 184
4) To avoid crises caused by lack of communication 184
5) To use communication as a means for solving your work-related problems 173
6) To clarify the limits of your responsibility 179
7) To maximize your effectiveness in crisis situations by reducing stress 180
8) To improve physical and emotional health 1
9) To successfully respond to a crisis situation 181
10) To recognize warning signs of crisis 179
11) To gain practice in quick thinking 180
12) To minimize crises by planning ahead 185
13) To evaluate your response in a crisis situation 182
14) To document successful response to a crisis situation 182
15) To expand the number and complexity of situations where you may utilize problem-solving skills 176
16) To increase the opportunity to use problem-solving skills 176

4. Administration

On-The-Job Development Activities

1) To improve the clarity and/or completeness of your forms, reports 205
2) To ensure you understand what is expected of an administrative function 191
3) To avoid losing track of complex administrative functions 191
4) To have important decisions readily accessible for your use and the use of others 205
5) To make important information available to others 193
6) To improve the clarity of your documents by using straight forward, understandable language 196
7) To improve the usefulness of the files 206
8) To expand the use of filing systems 206

5. Written Communication

On-The-Job Development Activities

1) To improve the clarity and/or completeness of your forms, reports 205
2) To spot and reduce the number of errors in usage, spelling, and punctuation 49
3) To review principles of usage 48
4) To write clearly and concisely 49
5) To build vocabulary 47
6) To improve the effectiveness of your written communication through the use of graphs and charts 52
7) To improve the link between thinking and writing 52
8) To gain practice in capturing main topics 52
9) To extend editing skills 52
10) To capitalize on strengths in written communications 54

6. Oral Communication

On-The-Job Development Activities

1) To improve clarity and organization when giving information orally 42
2) To improve conciseness of speech 41
3) To avoid miscommunication 42
4) To enlarge your speaking vocabulary 42
5) To improve discretion and confidentiality in communication 55
6) To improve format presentations 44
7) To improve your listening skills 41
8) To improve oral communication by increased opportunities 45

7. Coordination

On-The-Job Development Activities

1) To identify the resources necessary for good coordination 111
2) To facilitate future planning and avoid crisis situations 142
3) To become more aware of the talents and skills of others 82
4) To ensure instructions are clear 78
5) To utilize your manager to help you become a better coordinator 123
6) To improve your coordination capabilities through increased knowledge 111
7) To avoid rigidity in coordination functions 119
8) To further improve coordination capabilities 122

8. Directing Others

On-The-Job Development Activities

1) To assign work with increasing efficiency 85
2) To determine categories when assigning work 76
3) To improve standard setting when assigning work 76
4) To improve monitoring functions 89
5) To improve the clarity of your job assignments 76
6) To minimize assignment problems caused by insufficient training 99
7) To become more approachable to others 90
8) To coordinate activities on a project 111
9) To improve progress reviews of employees 88
10) To improve employee motivation 92
11) To make your criticisms more constructive 91
12) To give credit when credit is due 91
13) To develop an open attitude about your own performance 92
14) To further improve your directing skills 87

9. Know-How

On-The-Job Development Activities

1) To improve your know-how 215
2) To keep aware of changes in organizational policies and procedures 38
3) To improve know-how by communication with others 217
4) To gain a broader perspective of your job and its functions 215
5) To share know-how with colleagues 223
6) To capitalize on strengths in know-how 224
7) To improve know-how through coursework 219
8) To improve know-how through additional training 219

10. Effort/Innovation

On-The-Job Development Activities

1) To improve physical and emotional health 1
2) To improve effort by reorganizing priorities 20
3) To improve effort by eliminating disruptive factors 18
4) To clarify career goals 1
5) To improve receptivity to new responsibilities and job assignments 17
6) To set own deadlines 130
7) To avoid minor frustrations halting your work 18
8) To improve estimates of time required to complete tasks 130
9) To acquire and apply new skills 1
10) To improve your assertiveness skills 1
11) To become more comfortable with change 9
12) To better notice problem situations 22
13) To create a climate of innovation 11
14) To loosen blocks to creativity 11
15) To capitalize on strengths in innovation of future development 14

CONSULTANT

1. Work Organization

On-The-Job Development Activities

1) To more effectively utilize your time 131
2) To improve daily work scheduling 130
3) To eliminate interruptions in your planning time 125
4) To include an appropriate amount of detail in plans and proposals 127
5) To accurately assess organizational needs by examining categories of need and the available resources 125
6) To minimize the number of changes once a plan is implemented 136
7) To delegate appropriately 75
8) To make informational materials available to employees 76
9) To ensure that work proceeds in your absence 87
10) To monitor progress toward goals 143
11) To meet project deadlines through backward planning 131
12) To meet deadlines by rearranging priorities 131
13) To gain further expertise in planning through observing and working with others 136
14) To improve accuracy of time and expense estimates through systematic research 148
15) To increase flexibility in work planning 136
16) To anticipate and prepare for upcoming changes 141
17) To gain practice in the planning process 129
18) To increase long-range perspective 142
19) To improve long-range planning abilities 142
20) To capitalize on strengths in planning 144

2. Administration

On-The-Job Development Activities

1) To handle paperwork more promptly and thoroughly 204
2) To organize records into a useful system 206
3) To maintain ready access to documents and records by keeping them in their proper place 207
4) To more carefully document inquiries 194
5) To have important decisions readily accessible for your use and the use of others 205
6) To maintain accurate and up-to-date records 203
7) To avoid errors by recording information immediately 204
8) To increase attention to detail in paperwork 195
9) To improve the clarity of your documents by using straightforward, understandable language 196
10) To reduce amount of time necessary to process paperwork by prioritizing and scheduling 193
11) To prevent reinvention of the wheel by reviewing similar projects and adapting pertinent procedures and solutions 208
12) To capitalize on strengths in administration by assisting colleagues in improving their administrative skills 193

3. Analyzing and Evaluating

On-The-Job Development Activities

1) To improve problem diagnosis 163
2) To improve problem analysis 172
3) To improve assessment of the strengths and weaknesses of alternative solutions 171
4) To minimize over-attention to detail by listing and prioritizing the necessary information 172
5) To ensure day-to-day corrective decisions are made promptly 173
6) To improve setting of priorities 176
7) To cope with mental blocks 173
8) To improve decision-making effectiveness by initially determining what, who, how, and when 173
9) To anticipate potential problems by identifying areas of risk 169
10) To anticipate potential problems by using formal and informal communication networks 169
11) To capitalize on strong problem-solving skills 176

4. Crisis Action

On-The-Job Development Activities

1) To recognize warning signs of crisis 179
2) To successfully respond to a crisis situation 181
3) To avoid overreacting to crisis situations 179
4) To maximize your effectiveness in crisis situations by reducing stress 180
5) To eliminate potential causes of crisis situations 183
6) To avoid crises by appropriately responding to change 183
7) To avoid crises by planning ahead 184

8) To increase flexibility in work planning 179
9) To better cope with unforeseen problems 181
10) To improve ability to handle unexpected events 181
11) To capitalize on strengths in handling crisis situations 185
12) To utilize skills in handling crises 185

5. Written Communication

On-The-Job Development Activities

1) To provide complete and accurate information 51
2) To provide nonroutine information to others more promptly 192
3) To avoid miscommunication 42
4) To build vocabulary 47
5) To write in terms that are clear and understandable to the non-technical reader by avoiding the use of technical jargon 49
6) To master the basic rules of written English 47
7) To write clearly and concisely 49
8) To provide accurate and meaningful tables, charts, and slides through definition and evaluation 51
9) To capitalize on strengths in written communications 54

6. Oral Communication

On-The-Job Development Activities

1) To provide complete and accurate information 51
2) To avoid miscommunication 42
3) To build vocabulary 47
4) To become aware of how one sounds to others 67
5) To improve conciseness of speech 41
6) To improve discretion and confidentiality in communication 55
7) To improve formal presentations 44
8) To improve oral communication by increased opportunities 45
9) To improve listening skills by identifying and correcting current weaknesses 41
10) To improve awareness of nonverbal interactions 58
11) To further develop strong oral communication skills 43
12) To capitalize on strengths in oral communication 45

7. Coordination

On-The-Job Development Activities

1) To improve others' understanding of projects by clarifying requirements 79
2) To improve group leadership skills by understanding the group process 112
3) To better handle interpersonal conflict 56
4) To ensure plans that require the assistance of others are possible to carry out 129
5) To improve respect for objectives and constraints under which other groups and service units are operating 120
6) To increase awareness of other organizations' resources through investigation and interaction 112
7) To develop interorganizational coordinating skills by increasing interaction 113
8) To become more familiar with the work of other units 112
9) To become more flexible in decision making by examining and evaluating past decisions 171
10) To further improve coordination capabilities 122

8. Project/Program/Product Leadership

On-The-Job Development Activities

1) To monitor progress toward goals 143
2) To meet project deadlines through backwards planning 131
3) To provide sufficiently detailed instructions and explanations 78
4) To delegate the right amount of work by utilizing feedback 81
5) To delegate as many duties as possible 75
6) To ensure that employees exercise the proper degree of authority 88
7) To provide prompt, specific feedback to team members through frequent, open discussion 118
8) To develop the ability to motivate others by observing and emulating effective motivational strategies 120
9) To utilize the strengths of others when delegating work 84
10) To capitalize on strengths in providing instructions and explanations 79
11) To capitalize on strengths in motivating others 122

9. Organizational Effectiveness

On-The-Job Development Activities

1) To identify appropriate contact people within the organization by understanding the organizational structure 37
2) To become more familiar with organizational regulations and to keep abreast of policy changes by being informed of relevant procedures and policies 37
3) To develop an integrated conception of the organization and its goals by identifying objectives, functions, and resources 37
4) To maintain and improve the quality of interpersonal relationships within the organization by understanding and responding to the needs of others 59
5) To improve flexibility and avoid rigidity by remaining open and receptive to the suggestions of others 59
6) To anticipate and prepare for upcoming changes by using formal and informal communication networks 39
7) To develop more forceful personal impact on others by appropriately asserting your ideas 39
8) To achieve greater integration among subunits working together by minimizing competition 38
9) To become more politically astute through an awareness of decision-making authority and responsibility 38
10) To be more aware of organizational trends and direction by understanding current activity in your field of endeavor 37

10. Know-How

On-The-Job Development Activities

1) To identify potential technical resources 216
2) To be more critical in the use of reference sources 216
3) To improve know-how by communication with others 217
4) To improve know-how through communication with other organizations 217
5) To improve know-how through coursework 219
6) To more effectively communicate know-how to others 224
7) To increase your store of readily available information 218
8) To broaden technical knowledge by initiating a self-development program 217
9) To more effectively communicate know-how to individuals outside one's area of expertise 225
10) To share know-how with colleagues 223
11) To keep aware of changes in organizational policy and procedure 38
12) To capitalize on strengths in know-how by creating an information exchange system 223
13) To capitalize on strengths in know-how 224

11. Concept/Idea Development

On-The-Job Development Activities

1) To become more comfortable with change 9
2) To anticipate change by keeping up-to-date with technical literature 9
3) To anticipate change by keeping informed of activities outside of one's own specialty 10
4) To improve problem analysis 172
5) To become more innovative by developing broader reading habits 10
6) To generate alternative solutions to problems by considering related effects and constraints 174
7) To generate innovative approaches to work procedures 13
8) To broaden the applicability of innovative problem solutions 13
9) To loosen blocks to creativity 11
10) To create a climate of innovation 11
11) To capitalize on strengths in innovation of future development 14
12) To apply strengths in innovation to existing products/services 14

12. Job-Oriented Motivation

On-The-Job Development Activities

1) To minimize procrastination 17
2) To accomplish your goals for the day or week 20
3) To avoid boredom and develop more enthusiasm in carrying out tasks and assignments 7

4) To exert more effort in planning for goal accomplishment 138
5) To improve physical and emotional health 1
6) To set own deadlines 130
7) To meet deadlines 21
8) To capitalize upon strong motivation by improving procedures 20
9) To increase initiative 5
10) To assume additional responsibilities 6
11) To set challenging goals and exert more effort than required 7
12) To display more persistence in defending ideas 15
13) To acquire and apply new skills 1
14) To clarify career goals 1

CUSTOMER SERVICE SPECIALIST

1. Diagnosing Problems

On-The-Job Development Activities

1) To use reference materials more effectively in diagnosing problems 161
2) To improve your ability to diagnose the causes of problems 162
3) To improve the speed and efficiency with which you diagnose problems 162
4) To improve skill at diagnosing complex problems 163
5) To more effectively use diagnostic programs 164
6) To learn more from experience at diagnosing problems 165
7) To improve skill at questioning customers (and others) 66
8) To become more aware of whether customers' needs for equipment information are responsible for equipment problems 165
9) To capitalize on diagnostic skills 166
10) To capitalize on strong skills in diagnosing problems 166

2. Repairing Problems

On-The-Job Development Activities

1) To improve confidence and reduce reluctance to work on complex problems or unfamiliar equipment 247
2) To get the greatest benefit from repair experiences 247
3) To decrease time spent in customer conversation 67
4) To improve the thoroughness and effectiveness of housekeeping efforts 248
5) To decrease call-backs and customer complaints 249
6) To reduce time spent repairing problems 249
7) To improve awareness of customers' needs for equipment information 64
8) To capitalize upon strong housekeeping and repair skills 251
9) To capitalize upon your skill at repairing problems 251

3. Administration and Coordination

On-The-Job Development Activities

1) To ensure that everything you need to perform your job is readily available 149
2) To make more efficient use of available reference materials 149
3) To more effectively utilize your time 131
4) To improve appropriateness of scheduled priorities 127
5) To reduce response time 133
6) To capitalize upon strong scheduling skills 133
7) To capitalize upon strong administrative and planning skills 191

4. Work Oriented Communication

On-The-Job Development Activities

1) To improve recordkeeping efficiency, clarity, and usefulness 205
2) To write clearly and concisely 49
3) To avoid miscommunication 42
4) To handle paperwork more promptly and thoroughly 204
5) To improve appropriateness of information included in documentation 197
6) To become more attentive to detail in documentation 194
7) To provide nonroutine information to others more promptly 192
8) To capitalize on strengths in written communications 54
9) To capitalize on strengths in documentation 200
10) To further improve strong oral communication skills 44

5. Customer-Oriented Behavior

On-The-Job Development Activities

1) To enlarge your speaking vocabulary 42
2) To improve discretion and confidentiality in communication 55
3) To become aware of how one sounds to others 67
4) To improve skill at questioning customers (and others) 66
5) To decrease time spent in customer conversation 67
6) To improve awareness of nonverbal interactions 58
7) To improve the ability to think on one's feet 43
8) To improve understanding of vocabulary in customers' areas of work 63
9) To become more skillful at handling irate customers 68
10) To improve awareness of customers' need for equipment information 64
11) To capitalize on strong customer-relations skills 73
12) To capitalize upon skill in dealing with customers 73

6. Job-Oriented Motivation

On-The-Job Development Activities

1) To clarify basic job requirements 17
2) To improve low work energy, drive, and initiative through prioritizing 8
3) To improve physical and emotional health 1
4) To recognize the difference between a highly motivated employee and one less well motivated 19
5) To avoid boredom and develop more enthusiasm in carrying out tasks and assignments 7
6) To better cope with unforeseen problems 181
7) To minimize procrastination 17
8) To increase initiative 5
9) To clarify career goals 1
10) To acquire and apply new skills 1
11) To increase enthusiasm by developing interests outside of work 7
12) To capitalize upon strong motivation by improving procedures 20
13) To capitalize upon strong motivation by seeking new challenges 6

7. Directing Others

On-The-Job Development Activities

1) To become more aware of the talents and skills of others 82
2) To become more approachable to others 90
3) To keep employees better informed about relevant publications 90
4) To improve tolerance for and skill at handling opposing viewpoints 90
5) To minimize assignment problems caused by insufficient training 99
6) To more effectively provide assistance and opportunities for development 99
7) To improve skill at providing constructive criticism 105
8) To capitalize on effective utilization of human resources 116
9) To further improve your directing skills 87

DATA PROCESSING OPERATIONS

1. Quality of Work

On-The-Job Development Activities

1) To establish work standards 31
2) To ensure that established procedures are being followed 32
3) To improve the ability to complete work when standard procedures are not applicable 32
4) To increase accuracy of work 33
5) To improve accuracy of documentation 195
6) To increase extent to which work output meets specifications 33
7) To improve clarity of documentation 197
8) To improve work quality through skill development 35
9) To further improve good quality work 34
10) To capitalize on a thorough knowledge of format specifications 32

2. Volume of Work

On-The-Job Development Activities

1) To accurately assess employees' volume of work 157
2) To reduce time lost by ensuring that employees follow appropriate processes 158
3) To improve concentration on the job 158
4) To use goal setting as a method for improving output 157
5) To increase efficiency of work procedures 158
6) To ensure that time spent accurately reflects priorities 159
7) To meet project deadlines through backwards planning 131
8) To increase margin in employees' performance 157
9) To cope more effectively with increases in work load by developing flexibility on the job 157
10) To cope more efficiently with demanding or complex work 157
11) To cope more effectively with work pressures 158
12) To capitalize upon good work volume 160

3. Problem Solving

On-The-Job Development Activities

1) To avoid problems caused by operator error 170
2) To improve setting of priorities 176
3) To ensure day-to-day corrective decisions are made promptly 173
4) To improve problem diagnosis 163
5) To improve the quality of chosen solutions 172
6) To improve assessment of the strengths and weaknesses of alternative solutions 171
7) To recognize adequately functioning equipment 170
8) To use reference materials more effectively in diagnosing problems 161
9) To improve information gathering when problems occur 161
10) To learn more from your experience at diagnosing problems 165
11) To improve skills in locating problems 165
12) To develop skills in anticipating problems 169
13) To further develop diagnostic skills 162
14) To take preventive action for averting problems 170
15) To anticipate potential problems by identifying areas of risk 169
16) To make improvements in non-technical areas 174
17) To capitalize upon strengths through sharing of knowledge 166
18) To capitalize on strong problem-solving skills 176

4. Safety and Maintenance

On-The-Job Development Activities

1) To improve safety practices 253
2) To prevent problems from recurring 253
3) To spot potential problems early 253
4) To improve safety practices through increased competence 253
5) To improve housekeeping 253
6) To reduce the incidence of horseplay 254
7) To improve maintenance functions 254
8) To capitalize upon maintenance skills 254
9) To capitalize upon housekeeping skills 255

5. Documentation

On-The-Job Development Activities

1) To improve documentation in the form of records and logs 196
2) To improve documentation through increased know-how 196
3) To improve clarity of documentation 197
4) To improve recordkeeping through attention to time factors 204
5) To improve documentation by better access to information 196

6) To become more attentive to detail in documentation 194
7) To improve efficiency in gathering information 199
8) To capitalize upon good documentation skills 200
9) To utilize good documentation skills by evaluating procedures for the organization as a whole 200

6. Interaction With Others

On-The-Job Development Activities

1) To improve ability to follow instructions 31
2) To more actively seek and utilize feed-back about your job performance 4
3) To improve awareness of nonverbal interactions 58
4) To increase effectiveness as a team member 56
5) To improve working relationships 55
6) To improve customer relations 68
7) To become more skillful at handling irate customers 68
8) To reduce the incidence and impact of interpersonal problems 57
9) To improve cooperation as a team member 56
10) To capitalize on an ability to handle customer complaints 72
11) To capitalize upon good interpersonal skills 60

7. Coordination

On-The-Job Development Activities

1) To ensure instructions are clear 77
2) To ensure instructions are complete 77
3) To improve control over the progress of assigned work 86
4) To improve distribution of work loads 80
5) To improve coordination of employee's work with others 117
6) To improve the ability to coordinate change effectively 121
7) To capitalize upon strong scheduling skills 133
8) To capitalize on strong coordination skills 123

8. Communication

On-The-Job Development Activities

1) To improve the tone of communications 55
2) To provide complete and accurate information 51
3) To provide nonroutine information to others more promptly 192
4) To write clearly and concisely 49
5) To build vocabulary 47
6) To spot and reduce the number of errors in usage, spelling, and punctuation 49
7) To improve spelling 48
8) To increase knowledge of grammar 47
9) To improve clarity and organization when giving information orally 42
10) To improve listening skills by identifying and correcting current weakness 41
11) To avoid miscommunication 42
12) To improve conciseness of speech 41
13) To provide sufficiently detailed instructions and explanations 78
14) To capitalize upon oral communication skills 45
15) To capitalize on strengths in written communications 54

9. Knowledge of Job

On-The-Job Development Activities

1) To increase understanding of established operational/administrative procedures 219
2) To increase understanding of job scope 219
3) To increase knowledge about equipment used on the job 220
4) To keep aware of changes in organizational policy and procedure 38
5) To broaden technical knowledge 2
6) To broaden technical knowledge 215
7) To develop a routine for keeping up-to-date 218
8) To evaluate current operating procedures 220
9) To capitalize on skill in handling equipment 222

10. Commitment to Job

On-The-Job Development Activities

1) To increase flexibility regarding work schedule 27
2) To improve adaptability by changing work routine 27
3) To increase assistance offered to others 59
4) To increase acceptance of difficult work assignments 27
5) To increase awareness of job relevance 28
6) To increase job satisfaction 30
7) To increase job scope 28
8) To avoid boredom and develop more enthusiasm in carrying out tasks and assignments 7

9) To avoid getting blocked by minor frustrations 18
10) To increase adaptability in the use of slack time 27
11) To capitalize on strong job commitment 28

11. Attendance and Punctuality

On-The-Job Development Activities

1) To ensure prompt arrival at work 25
2) To reduce problems caused by foreseeable absences 25
3) To increase presence at the work station 25
4) To maintain physical health 25
5) To cope with personal problems 25

TECHNICAL SPECIALIST

1. Quality Standards

On-The-Job Development Activities

1) To locate and eliminate causes of low quality work 227
2) To improve customer communications 227
3) To improve clarity of specifications 228
4) To ensure design meets specifications 228
5) To increase knowledge of design reliability 228
6) To increase the simplicity of design work 229
7) To improve understanding of the production function 229
8) To ensure equipment is in good operating order 229
9) To ensure equipment is properly operated 230
10) To capitalize on an ability to translate customer expectations into written specifications 230
11) To capitalize on a knowledge of design reliability 230

2. Problem Solving

On-The-Job Development Activities

1) To improve problem diagnosis 163
2) To improve problem analysis 172
3) To improve assessment of the strengths and weaknesses of alternative solutions 171
4) To ensure day-to-day corrective decisions are made promptly 173
5) To improve setting of priorities 176
6) To cope with mental blocks 173
7) To anticipate potential problems by identifying areas of risk 169
8) To anticipate potential problems by using formal and informal communication networks 169
9) To capitalize on strong problem-solving skills 176

3. Writing/Drawing

On-The-Job Development Activities

1) To improve clarity of equipment descriptions 50
2) To improve the organization of written technical material 50
3) To improve clarity of operational descriptions 50
4) To improve style of technical writing 53
5) To improve writing directions for others 52
6) To capitalize on technical writing expertise 53
7) To capitalize on drawing expertise 54

4. Record Keeping

On-The-Job Development Activities

1) To handle paperwork more promptly and thoroughly 204
2) To reduce amount of time necessary to process paperwork by prioritizing and scheduling 193
3) To locate information more readily 207
4) To maintain accurate and up-to-date log books 203
5) To more carefully document inquiries 194
6) To become more attentive to detail in documentation 194
7) To improve clarity of documentation 197
8) To improve appropriateness of information included in documentation 197
9) To document all key details of tests 195
10) To capitalize on strengths in documentation 200

5. Work Planning

On-The-Job Development Activities

1) To improve daily work scheduling 130
2) To improve appropriateness of scheduled priorities 127
3) To meet project deadlines through backwards planning 131
4) To minimize last-minute decision making 132
5) To improve ability to modify plans 137
6) To distinguish between standing plans and single-use plans 135
7) To ensure required data is on hand before project is begun 149
8) To improve ability to prepare a task breakdown structure 128
9) To improve distribution of workloads 80
10) To monitor progress toward goals 143
11) To gain further practice in planning and evaluating 129
12) To increase flexibility in work planning 136
13) To anticipate and prepare for upcoming changes 141
14) To capitalize upon strong scheduling skills 133

6. Financial Planning

On-The-Job Development Activities

1) To increase knowledge of cost reduction techniques 145
2) To increase knowledge of market and technical developments 145
3) To ensure cost estimates are based on appropriate back-up data 145
4) To improve accuracy of projected labor costs 146
5) To set up a personalized historical data bank
6) To improve monitoring of project expenditures 146
7) To increase communication with management regarding project expenditures 147
8) To further increase communication with management regarding project expenditures 147
9) To set up a cost estimate manual 147

7. Material Planning

On-The-Job Development Activities

1) To locate materials more quickly 150
2) To keep materials and supplies stored in their proper place 151
3) To improve safety on the work site 151
4) To avoid paperwork errors in ordering materials 152
5) To minimize errors in ordering materials because of design problems 152
6) To maintain appropriate inventory level 152
7) To ensure availability of materials when they are needed 153
8) To provide materials when they are needed 153
9) To reduce material costs 153
10) To identify alternative sources of materials 154
11) To determine preferred materials 154
12) To make more efficient use of available equipment materials 155
13) To capitalize on a thorough knowledge of safety requirements 155
14) To capitalize on strengths in material planning 156

8. Oral Communication

On-The-Job Development Activities

1) To improve conciseness of speech 41
2) To enlarge your speaking vocabulary 42
3) To avoid miscommunication 42
4) To provide nonroutine information to others more promptly 192
5) To improve communication with managers regarding project progress 57
6) To improve explanations of products/services to customers 55
7) To improve ability to speak to groups 44
8) To improve formal presentations 44
9) To improve awareness of nonverbal interactions 58
10) To capitalize on strong customer-relations skills 73
11) To further develop strong oral communications skills 43
12) To improve oral communication by increased opportunities 45

9. Coordination

On-The-Job Development Activities

1) To utilize your manager to help you become a better coordinator 123
2) To improve coordination among team members 118
3) To help set up project control centers 114
4) To improve quality of walk-throughs or review meetings 116
5) To improve coordination with other units and service groups 118
6) To improve respect for objectives and constraints under which other groups and service units are operating 120
7) To capitalize on a thorough understanding of the interrelationships among organizational units and groupings 39
8) To capitalize on strong negotiating skills 104
9) To further improve coordination capabilities 122

10. Directing Others

On-The-Job Development Activities

1) To ensure work assignments contain all vital data 76
2) To effectively utilize the talents of team members 117
3) To improve distribution of work loads 80
4) To improve control over the progress of assigned work 86
5) To become more approachable to others 90
6) To ensure employee performance meets project standards 121

7) To improve communication with management regarding team members' performance 121
8) To capitalize on effective utilization of human resources 116

11. Know-How

On-The-Job Development Activities

1) To identify potential technical resources 216
2) To be more critical in the use of reference sources 216
3) To broaden technical knowledge 2
4) To broaden technical knowledge 215
5) To increase your store of readily available information 218
6) To more effectively communicate know-how to others 224
7) To more effectively communicate know-how to individuals outside one's area of expertise 225
8) To keep aware of changes in organizational policy and procedure 38
9) To improve know-how through course work 219
10) To capitalize on strengths in know-how by assisting others 224
11) To capitalize on strengths in know-how by creating an information exchange system 223
12) To capitalize on strengths in know-how 224

12. Effort/Persistence

On-The-Job Development Activities

1) To minimize procrastination 17
2) To avoid boredom and develop more enthusiasm in carrying out tasks and assignments 7
3) To improve physical and emotional health 1
4) To avoid minor frustrations halting your work 18
5) To set own deadlines 130
6) To meet deadlines 21
7) To capitalize upon strong motivation by improving procedures 20
8) To set challenging goals and exert more effort than required 7
9) To display more persistence in defining ideas 15
10) To acquire and apply new skills 1
11) To clarify career goals 1

13. Innovation

On-The-Job Development Activities

1) To become more comfortable with change 9
2) To anticipate change by keeping up-to-date with technical literature 9
3) To anticipate change by keeping informed of activities outside of one's own specialty 10
4) To become more willing to take risks 10
5) To become more innovative by developing broader reading habits 10
6) To generate innovative approaches to work procedures 13
7) To broaden the applicability of innovative problem solutions 13
8) To utilize innovation in job assignments 14
9) To apply strengths in innovation to existing products/services 14
10) To capitalize on strengths in innovation of future development 14

MANAGEMENT

1. Planning and Allocating

On-The-Job Development Activities

1) To more effectively utilize your time 131
2) To improve daily work scheduling 130
3) To eliminate interruptions in your planning time 125
4) To include an appropriate amount of detail in plans and proposals 127
5) To accurately assess organizational needs by examining categories of need and the available resources 125
6) To minimize the number of changes once a plan is implemented 136
7) To delegate appropriately 75
8) To make informational materials available to employees 76
9) To ensure that work proceeds in your absence 87
10) To monitor progress toward goals 143
11) To meet project deadlines through backwards planning 131
12) To meet deadlines by rearranging priorities 131
13) To gain further expertise in planning through observing and working with others 136
14) To gain practice in the planning process 129
15) To increase long-range perspective 142
16) To improve long-range abilities 142
17) To capitalize on strengths in planning 144

2. Crisis Action

On-The-Job Development Activities

1) To improve the course of action taken when confronted by a crisis 180
2) To successfully respond to a crisis situation 181
3) To maximize your effectiveness in crisis situations by reducing stress 180
4) To avoid overreacting to crisis situations 179
5) To improve physical and emotional health 1
6) To eliminate potential causes of crisis situations 183
7) To avoid crises by appropriately responding to change 183
8) To ensure day-to-day corrective decisions are made promptly 173
9) To recognize warning signs of crisis 179
10) To increase flexibility in work planning 179
11) To better cope with unforeseen problems 181
12) To avoid crises by planning ahead 184
13) To minimize crises by planning ahead 185
14) To improve formal presentations 44
15) To improve ability to handle unexpected events 181
16) To capitalize on strengths in handling crisis situations 185
17) To utilize skills in handling crises 185

3. Administration

On-The-Job Development Activities

1) To handle paperwork more promptly and thoroughly 204
2) To organize records into a useful system 206
3) To locate information more readily 207
4) To maintain ready access to documents and records by keeping them in their proper place 207
5) To improve the usefulness of the files 206
6) To more carefully document inquiries 194
7) To have important decisions readily accessible for your use and the use of others 205
8) To maintain accurate and up-to-date records 203
9) To maintain up-to-date records on human and technical factors 203
10) To avoid errors by recording information immediately 204
11) To increase attention to detail in paperwork 195
12) To improve the clarity of your documents by using straightforward, understandable language 196
13) To reduce amount of time necessary to process paperwork by prioritizing and scheduling 193
14) To prevent reinvention of the wheel by reviewing similar projects and adapting pertinent procedures and solutions 208
15) To delegate more paperwork responsibilities 75
16) To capitalize on strengths in administration by assisting colleagues in improving their administrative skills 193

4. Coaching

On-The-Job Development Activities

1) To provide guidance to employees 103
2) To provide accurate instructions 77
3) To determine if employees are taking proper course of action 88
4) To avoid premature criticism of employees 83
5) To identify how employees' skills can be improved 98
6) To provide prompt, specific feedback to employees 103
7) To develop employees' ability to serve as your representative 107

5. Delegating

On-The-Job Development Activities

1) To provide sufficiently detailed instructions and explanations 78
2) To delegate the right amount of work by utilizing feedback 81
3) To delegate as many duties as possible 75
4) To utilize the strengths of others when delegating work 84
5) To improve control over the progress of assigned work 86
6) To ensure that employees exercise the proper degree of authority 88
7) To increase employees' degree of authority 87
8) To capitalize on strengths in delegating 85
9) To capitalize on strengths in providing instructions and explanations 79

6. Motivating

On-The-Job Development Activities

1) To develop ability to motivate employees 93
2) To increase praise of employees' work efforts 102
3) To increase acknowledgment of employees' progress 89
4) To utilize the strengths of others when delegating work 84
5) To increase the self-confidence of employees 102
6) To reduce competition among employees 83
7) To increase employees' commitment to the organization 92
8) To use discretion in criticizing organizational policies and procedures 29
9) To motivate employees to assume added responsibility 94
10) To capitalize on strengths in motivating employees 101
11) To capitalize on strengths in motivating others 122

7. Training

On-The-Job Development Activities

1) To provide a thorough orientation to new employees 97
2) To provide accurate instructions 77
3) To keep employees better informed about relevant publications 90
4) To increase patience and tactfulness 101
5) To plan ahead for training activities 108
6) To gear training programs to employees' needs 108
7) To measure the success of training programs 109
8) To measure the success of training programs via follow-up report file 109
9) To measure the success of training programs through application of knowledge gained 109
10) To broaden employees' exposure to other personnel within the organization 106
11) To institute job rotation 105
12) To prepare a selected employee as an understudy 106

8. Consideration

On-The-Job Development Activities

1) To become more approachable to others 90
2) To improve your listening skills 41
3) To better handle interpersonal conflict 56
4) To resolve conflicts among employees 57
5) To take a personal interest in employees 91
6) To involve employees in decisions 93
7) To utilize strong interpersonal skills 60

9. Communication

On-The-Job Development Activities

1) To provide complete and accurate information 51
2) To provide nonroutine information to others more promptly 192
3) To avoid miscommunication 42
4) To build vocabulary 47

5) To master the basic rules of written English 47
6) To write clearly and concisely 49
7) To improve oral communication by increased opportunities 45
8) To improve conciseness of speech 41
9) To improve formal presentations 44
10) To improve awareness of nonverbal interactions 58
11) To further develop strong oral communications skills 43
12) To capitalize on strengths in oral communication 45
13) To capitalize on strengths in written communications 54

10. Coordination

On-The-Job Development Activities

1) To improve others' understanding of projects by clarifying requirements 79
2) To improve group leadership skills by understanding the group process 112
3) To better handle interpersonal conflict 56
4) To ensure plans that require the assistance of others are possible to carry out 129
5) To improve respect for objectives and constraints under which other groups and service units are operating 120
6) To increase awareness of other organizations' resources through investigation and interaction 112
7) To develop interorganizational coordinating skills by increasing interaction 113
8) To become more familiar with the work of other units 112
9) To become more flexible in decision making by examining and evaluating past decisions 171
10) To further improve coordination capabilities 122

11. Representing

On-The-Job Development Activities

1) To understand organizational goals and policies 70
2) To respond quickly and accurately to outside inquiries 70
3) To assure customer satisfaction 70
4) To exercise more tact in written communications 70
5) To respond more tactfully to complaints regarding organizational goals and policies 71
6) To respond more calmly to accusations and complaints from outside the organization 71
7) To improve skills as a formal organizational representative 72
8) To broaden representing activities 72
9) To capitalize on strengths in representing 72

12. Urgency/Persistence/Effort

On-The-Job Development Activities

1) To accomplish your goals for the day or week 20
2) To set own deadlines 130
3) To exert more effort in planning for goal accomplishment 138
4) To minimize procrastination 17
5) To improve effort by eliminating disruptive factors 18
6) To improve effort by reorganizing priorities 20
7) To clarify career goals 1
8) To display more persistence in defending ideas 15
9) To increase initiative 5
10) To acquire and apply new skills 1
11) To assume additional responsibilities 6
12) To capitalize on strengths in effort 6

13. Organizational Commitment

On-The-Job Development Activities

1) To clarify career goals 1
2) To ensure a thorough understanding of the organization's goals and policies 29
3) To identify with organizational goals and values 29
4) To use discretion in criticizing organizational policies and procedures 29
5) To respond more tactfully to complaints regarding organization goals and policies 71
6) To ensure high ethical standards are maintained 35

14. Know-How

On-The-Job Development Activities

1) To keep aware of changes in organizational policies and procedures 38
2) To gain a broader perspective of your job and its functions 215

3) To improve know-how by communication with others 217
4) To improve know-how through communication with other organizations 217
5) To improve know-how through coursework 219
6) To identify potential technical resources 216
7) To broaden technical knowledge 2
8) To more effectively communicate know-how to individuals outside one's area of expertise 225
9) To improve your know-how 215
10) To improve know-how through additional training 219
11) To share know-how with colleagues 223
12) To capitalize on strengths in know-how 224

15. Innovation

On-The-Job Development Activities

1) To become more comfortable with change 9
2) To become more willing to take risks 10
3) To anticipate change by keeping up-to-date with technical literature 9
4) To generate innovative approaches to work procedures 13
5) To generate innovative solutions to work-related problems 13
6) To broaden the applicability of innovative problem solutions 13
7) To loosen blocks to creativity 11
8) To create a climate of innovation 11
9) To utilize innovation in job assignments 14
10) To capitalize on strengths in innovation of future development 14

OFFICE PERSONNEL

1. Quality of Work

On-The Job Development Activities

1) To establish work standards 31
2) To improve ability to follow instructions 31
3) To increase accuracy of work 33
4) To increase extent to which work output meets specifications 33
5) To improve neatness and clarity 34
6) To improve recordkeeping efficiency, clarity, and usefulness 205
7) To capitalize on the ability to follow instructions 31
8) To capitalize on a thorough knowledge of format specifications 32

2. Volume of Work

On-The-Job Development Activities

1) To improve concentration on the job 158
2) To use goal setting as a method for improving output 157
3) To increase efficiency of work procedures 158
4) To improve distribution of time among job duties 159
5) To increase work pace by improving work skills 160
6) To generate a log-in system 135
7) To meet deadlines through backwards planning 131
8) To capitalize on a swift work pace 160

3. Planning

On-The-Job Development Activities

1) To increase knowledge of available reference sources 150
2) To avoid repeated requests for information and/or assistance 150
3) To create an organized area of work 126
4) To ensure that everything you need to perform your job is readily available 149
5) To meet deadlines by rearranging priorities 131
6) To generate a log-in system 135
7) To improve daily work scheduling 130
8) To increase knowledge of filing systems 207
9) To improve usefulness of the files 206
10) To expand the use of filing systems 206
11) To improve access to records 207
12) To meet project deadlines through backwards planning 131

4. Coordination

On-The-Job Development Activities

1) To ensure instructions are clear 78
2) To ensure instructions are complete 77
3) To improve control over the progress of assigned work 86
4) To improve distribution of work loads 80
5) To improve training support given to new employees 97
6) To capitalize on strong training skills 110
7) To capitalize on strong coordination skills 123

5. Problem Solving

On-The-Job Development Activities

1) To ensure day-to-day corrective decisions are made promptly 173
2) To improve problem diagnosis 163
3) To improve the quality of chosen solutions 172
4) To cope more effectively with work pressures 175
5) To improve physical and emotional health 1
6) To improve setting of priorities 176
7) To take preventive action for averting problems 170

6. Interaction With Others

On-The-Job Development Activities

1) To improve ability to follow instructions 31
2) To more actively seek and utilize feedback about your job performance 4
3) To improve awareness of nonverbal interactions 58
4) To improve customer relations 68
5) To capitalize upon skill in dealing with customers 73
6) To capitalize on an ability to handle customer complaints 72
7) To capitalize on a good working relationship with a manager 60

7. Verbal Communication

On-The-Job Development Activities

1) To provide complete and accurate information 51

2) To provide nonroutine information to others more promptly 192
3) To improve grammar 48
4) To increase knowledge of grammar 47
5) To improve spelling 48
6) To build vocabulary 47
7) To improve conciseness of speech 41
8) To write clearly and concisely 49
9) To capitalize on strengths in written communications 54
10) To capitalize upon oral communication skills 45

8. Knowledge of Job

On-The-Job Development Activities

1) To increase understanding of established operational/ administrative procedures 219
2) To increase understanding of job scope 219
3) To increase appropriate use of organizational forms 222
4) To increase knowledge about equipment used on the job 220
5) To increase knowledge of grammar 47
6) To improve spelling 48
7) To evaluate current operating procedures 220
8) To capitalize on skill in handling equipment 222
9) To extend editing skills 52

9. Commitment To Job

On-The-Job Development Activities

1) To increase flexibility regarding work schedule 27
2) To improve adaptability by changing work routine 27
3) To clarify basic job requirements 17
4) To increase assistance offered to others 59
5) To increase acceptance of difficult work assignments 27
6) To increase awareness of job relevance 28
7) To increase job satisfaction 30
8) To increase job scope 28
9) To capitalize on strong job commitment 28

10. Attendance and Punctuality

On-The-Job Development Activities

1) To ensure prompt arrival at work 25
2) To increase presence at the work station 25
3) To maintain physical health 25
4) To cope with personal problems 25

COMPUTER PROGRAMMER/SYSTEMS ANALYST

1. Computer Program/System/Model Design

On-The-Job Development Activities

1) To improve at meeting design standards 239
2) To write more complete specifications 242
3) To improve clarity of specifications 239
4) To improve at specifying input conditions and interfaces 240
5) To improve programs' logical structure 240
6) To increase the simplicity of your designs 241
7) To capitalize upon strong design skills 241

2. Computer Program/System/Model Development

On-The-Job Development Activities

1) To become more effective at meeting coding standards 243
2) To become more effective at understanding existing programs 243
3) To improve analysis and algorithm development 244
4) To write more efficient modules 244
5) To increase speed of coding 244
6) To reduce the number of bugs in your written code 245
7) To improve effectiveness in writing program modifications 245
8) To capitalize on your efficiency in programming 246

3. Computer Program/System Integration and Evaluation

On-The-Job Development Activities

1) To increase thoroughness of testing 233
2) To become more familiar with debugging techniques 233
3) To become proficient in using a wider range of applicable tools 234
4) To improve use of automated testing techniques 234
5) To increase efficiency of debugging 234
6) To increase thoroughness of system testing 235
7) To increase thoroughness in developing integration test plans 235
8) To increase thoroughness in generating test data 236
9) To become more skilled recognizing potential problems in products to be tested 237
10) To capitalize on strong system testing skills 237

4. Computer Program/System Maintenance

On-The-Job Development Activities

1) To increase general readiness for resolving customers' problems 187
2) To increase diagnostic efficiency 187
3) To solve customers' problems more quickly 188
4) To increase effectiveness in conducting on-site diagnoses 189
5) To capitalize on maintenance activities 189
6) To capitalize on strong diagnostic skills 189

5. Documentation

On-The-Job Development Activities

1) To master the basic rules of written English 47
2) To increase amount of documentation and commenting completed during coding of computer programs 199
3) To increase efficiency at documenting 199
4) To improve at meeting documentation standards 198
5) To improve clarity of documentation 197
6) To improve appropriateness of information included in documentation 197
7) To capitalize on strengths in documentation 200

6. Customer Contact

On-The-Job Development Activities

1) To increase thoroughness in meeting customer requests 64
2) To improve identifying customers' needs 63
3) To improve understanding of vocabulary in customers' areas of work 63
4) To convey greater self-assurance in your technical expertise 69
5) To become more skillful at handling irate customers 68
6) To capitalize on strong customer-relations skills 73

7. Coordination

On-The-Job Development Activities

1) To reduce uncertainty about what is expected in new assignments 113

2) To develop smoother working relationships with associates in customer contact units 58
3) To become more familiar with the work of other units 112
4) To overcome difficulties in work relationships with associates in other units 119
5) To improve coordination of information for project members 115
6) To improve respect for objectives and constraints under which other groups and service units are operating 120
7) To improve skill in identifying personnel resources 111
8) To improve at communicating expectations 79
9) To capitalize on strong coordination skills 123
10) To further improve coordination capabilities 122

8. Support/Organizational Interface

On-The-Job Development Activities

1) To increase acceptance of difficult work assignments 27
2) To provide higher quality information 192
3) To more actively seek feedback about your job performance 4
4) To develop your ability to work under minimal supervision 22
5) To cope more effectively with work pressures 175
6) To increase assistance offered to others 59
7) To capitalize on a thorough understanding of the interrelationships among organizational units and groupings 39

9. Technical/Project Leadership

On-The-Job Development Activities

1) To develop leadership skills 100
2) To improve distribution of project-relevant information 114
3) To improve ability to meet deadlines 21
4) To minimize last-minute decision making 84
5) To improve delegation of work 115
6) To improve control over the progress of assigned work 86
7) To become better at giving criticism constructively 122
8) To become more successful at motivating individual project members 94
9) To become more successful at motivating project team members 81
10) To improve use of project control mechanisms 89
11) To improve coordination among team members 118
12) To improve quality of walk-throughs or review meetings 116
13) To capitalize upon strong leadership skills 101
14) To capitalize on strong scheduling skills 86

10. Training

On-The-Job Development Activities

1) To ensure instructions are clear 78
2) To improve at giving on-the-job training 98
3) To increase patience and tactfulness 101
4) To improve at giving assistance in general 103
5) To develop more effective recommendations for training programs 107
6) To capitalize on strong training skills 110
7) To capitalize on high effectiveness in conducting customer training 73

11. Planning and Organizing

On-The-Job Development Activities

1) To improve work preparation 127
2) To reduce amount of time spent unproductively 134
3) To improve daily work scheduling 130
4) To improve estimates of time requirements 132
5) To improve long-term planning of own work 141
6) To reduce unanticipated influences on work progress 137
7) To improve appropriateness of scheduled priorities 127
8) To improve ability to modify plans 137
9) To improve ability to prepare a task breakdown structure 128
10) To increase flexibility in work planning 136
11) To capitalize upon strong scheduling skills 133

12. Know-How

On-The-Job Development Activities

1) To increase your store of readily available information 218
2) To broaden technical knowledge 215
3) To develop a routine for keeping up-to-date 218

4) To develop competence in another application/system field 221
5) To improve know-how through coursework 219
6) To capitalize upon programming competence in an unusual application/system field 222
7) To capitalize upon strengths in know-how by creating an information exchange system 223

13. Effort/Innovation

On-The-Job Development Activities

1) To improve low work energy, drive, and initiative through prioritizing 8
2) To improve low work energy, drive, and initiative through job satisfaction 8
3) To increase work pace 21
4) To demonstrate a more professional approach to working hours 17
5) To increase achievement motivation and professionalism 19
6) To become more innovative 11
7) To become proficient in developing new or improved work methods 12
8) To capitalize on high work energy 5
9) To capitalize on high work energy and ingenuity 5

SALES REPRESENTATIVE

1. Quality of Planning

On-The-Job Development Activities

1) To improve implementation of SASP 128
2) To ensure that the goal or problem is clearly defined 125
3) To improve daily work scheduling 130
4) To ensure that the plan you choose is the best one available 126
5) To list strengths and weaknesses in specific, concrete terms 136
6) To ensure plans that require the assistance of others are possible to carry out 129
7) To improve ability to modify plans 137
8) To include adequate evaluation along with your planning 135
9) To meet project deadlines through backwards planning 131
10) To improve long-term planning of own work 141
11) To distinguish between standing plans and single-use plans 135
12) To increase flexibility in work planning 136
13) To improve distribution of workloads 80

2. Forecasting Accuracy

On-The-Job Development Activities

1) To improve sales forecast accuracy in terms of value 213
2) To improve sales forecast accuracy in terms of timing 213
3) To improve the quality of business booked through data forms 213
4) To improve forecasting for account decision making 213
5) To improve the use of forecast data in carrying out your account management functions 214

3. Prospect Management

On-The-Job Development Activities

1) To identify those firms in the territory that are worthwhile for converting into business 211
2) To improve opening skills 211
3) To enhance qualifying skills 211
4) To improve presenting skills 212
5) To improve closing skills 212
6) To devote prospect time on a more strategic basis 212
7) To identify and cultivate high potential prospects 212

4. Account Management

On-The-Job Development Activities

1) To build and enhance account relationships 209
2) To increase sales of current customers 209
3) To enhance the servicing aspect of account management 209
4) To improve the management of your territory 210
5) To improve sales deployment effort consistent with strategies and plans 210
6) To determine why customers are satisfied 210

5. Administration

On-The-Job Development Activities

1) To improve the clarity of your documents by using straightforward, understandable language 196
2) To ensure you understand what is expected of an administrative function 191
3) To avoid losing track of complex administrative functions 191
4) To have important decisions readily accessible for your use and the use of others 205
5) To avoid errors by recording information immediately 204
6) To improve the clarity and/or completeness of your forms, reports 205
7) To maintain accurate and up-to-date records 203
8) To handle paperwork more promptly and thoroughly 204
9) To more carefully document inquiries 194
10) To avoid missing important information in memos and reports 192
11) To increase attention to detail in paperwork 195
12) To reduce amount of time necessary to process paperwork by prioritizing and scheduling 193
13) To exercise increased expense control 148
14) To ensure that everything you need to perform your job is readily available 149
15) To improve recordkeeping through attention to time factors 204
16) To accomplish your goals for the day or week 20
17) To avoid losing sight of the original goal 125
18) To facilitate future planning and avoid crisis situations 142
19) To improve daily work scheduling 130
20) To improve appropriateness of scheduled priorities 127

21) To improve distribution of workloads 80
22) To more effectively utilize your time 131
23) To assess time spent on a specific project 130
24) To minimize the amount of time taken on specific tasks 129
25) To avoid boredom and develop more enthusiasm in carrying out tasks and assignments 7

6. Customer Communications

On-The-Job Development Activities

1) To increase thoroughness in meeting customer requests 64
2) To improve identifying customers' needs 63
3) To improve understanding of vocabulary in customers' areas of work 63
4) To become more skillful at handling irate customers 68
5) To improve skill at questioning customers (and others) 66
6) To decrease time spent in customer conversation 67
7) To enlarge your speaking vocabulary 42
8) To improve discretion and confidentiality in communication 55
9) To become aware of how one sounds to others 67
10) To improve awareness of nonverbal interactions 58
11) To improve the ability to think on one's feet 43
12) To improve formal presentations 44
13) To write clearly and concisely 49
14) To capitalize upon good interpersonal skills 60

7. Support Organization Interface

On-The-Job Development Activities

1) To develop smoother working relationships with associates in customer contact units 58
2) To more actively seek and utilize feedback about your job performance 4
3) To provide higher quality information 192
4) To more effectively utilize your time 131
5) To cope more effectively with work pressures 175
6) To capitalize on strong negotiating skills 104
7) To improve distribution of workloads 80

8. Internal Management Interface

On-The-Job Development Activities

1) To avoid miscommunication 42
2) To provide nonroutine information to others more promptly 192
3) To provide higher quality information 192
4) To write clearly and concisely 49
5) To improve conciseness of speech 41
6) To capitalize on strengths in written communications 54
7) To further develop strong oral communications skills 43
8) To improve awareness of nonverbal interactions 58

9. Effort/Innovation

On-The-Job Development Activities

1) To improve physical and emotional health 1
2) To accomplish your goals for the day or week 20
3) To set own deadlines 130
4) To avoid minor frustrations halting your work 18
5) To improve effort by reorganizing priorities 20
6) To improve effort by eliminating disruptive factors 18
7) To exert more effort in planning for goal accomplishment 138
8) To improve estimates of time required to complete tasks 130
9) To increase job satisfaction 30
10) To minimize procrastination 17
11) To clarify career goals 1
12) To better notice problem situations 22
13) To acquire and apply new skills 1
14) To improve receptivity to new responsibilities and job assignments 17
15) To become more comfortable with change 9
16) To loosen blocks to creativity 11
17) To create a climate of innovation 11
18) To display more persistence in defending ideas 15
19) To utilize innovation in job assignments 14

10. Self-Development

On-The-Job Development Activities

1) To clarify career goals 1
2) To increase initiative 5
3) To acquire and apply new skills 1
4) To set challenging goals and exert more effort than required 7
5) To keep aware of changes in company policy and procedure 38
6) To improve know-how through course work 2
7) To identify potential technical resources 216
8) To overcome weaknesses in technical areas 3
9) To broaden technical knowledge 2
10) To develop a routine for keeping up-to-date 218
11) To increase enthusiasm by developing interests outside of work 7

TECHNICIAN

1. Quality of Work

On-The-Job Development Activities

1) To establish work standards 31
[illegible] To improve ability to follow instructions 31
[illegible] To increase accuracy of work 33
4) To improve neatness and clarity 34
5) To improve use of materials 34
6) To improve work quality through skill development 35
7) To achieve a balance between independence and interdependence 31
8) To improve quality through better communication 34
9) To improve support of quality of work 34
10) To further improve good quality work 34

2. Volume of Work

On-The-Job Development Activities

1) To accurately assess employees' volume of work 157
2) To improve concentration on the job 158
3) To use goal setting as a method for improving output 157
4) To increase efficiency of work procedures 158
5) To ensure that time spent accurately reflects priorities 159
6) To meet project deadlines through backwards planning 131
7) To increase margin in employees' performance 157
8) To cope more effectively with work pressures 158
9) To cope more effectively with increases in work load by developing flexibility on the job 157
10) To capitalize upon good work volume 160

3. Diagnosing Problems

On-The-Job Development Activities

1) To recognize adequately functioning equipment 170
2) To recognize a malfunction or problem when it occurs 161
3) To improve information gathering when problems occur 161
4) To improve familiarity with equipment 161
5) To improve problem diagnoses in written work 164
6) To improve ability in locating problems 164
7) To improve skills in locating problems 165
8) To improve troubleshooting skills 174
9) To develop skills in anticipating problems 169
10) To further develop diagnostic skills 162
11) To capitalize upon strengths through sharing of knowledge 166

4. Repairing Problems

On-The-Job Development Activities

1) To increase the number and complexity of repairs made 247
2) To improve use and knowledge of tools in repair 248
3) To increase the permanence of repairs made 248
4) To spot and reduce the number of errors in usage, spelling, and punctuation 49
5) To improve efficiency in repair functions 250
6) To improve procedures 250
7) To make improvements in non-technical areas 250
8) To further increase repairing skills 250
9) To develop skills through sharing with others 251

5. Safety and Maintenance

On-The-Job Development Activities

1) To improve safety practices 253
2) To prevent problems from reocurring 253
3) To improve safety practices through increased competence 253
4) To spot potential problems early 253
5) To improve housekeeping 253
6) To reduce the incidence of horseplay 254
7) To improve maintenance functions 254
8) To improve tool and equipment storage 254
9) To capitalize upon maintenance skills 254
10) To capitalize upon housekeeping skills 255

6. Documentation

On-The-Job Development Activities

1) To improve documentation in the form of records and logs 196
2) To improve documentation through increased know-how 196
3) To improve recordkeeping through attention to time factors 204

4) To improve documentation by better access to information 196
5) To improve quality through better tools and procedures 197
6) To improve the usefulness of documents by sharing ideas 198
7) To capitalize upon good documentation skills 200

7. Communication

On-The-Job Development Activities

1) To write clearly and concisely 49
2) To spot and reduce the number of errors in usage, spelling, and punctuation 49
3) To build vocabulary 47
4) To improve clarity and organization when giving information orally 42
5) To improve your listening skills 41
6) To avoid miscommunication 42
7) To improve courteous communication 55
8) To reduce the incidence and impact of interpersonal problems 57
9) To provide accurate instructions 77
10) To capitalize on strengths in written communications 54
11) To capitalize upon oral communication skills 45

8. Cooperation

On-The-Job Development Activities

1) To ensure that everything you need to perform your job is readily available 149
2) To more effectively utilize your time 131
3) To improve coordination of employee's work with others 117
4) To ensure planning is detailed enough 126
5) To increase effectiveness as a team member 56
6) To improve working relationships 55
7) To capitalize upon planning abilities 139
8) To capitalize upon good interpersonal skills 60

9. Know-How

On-the-Job Development Activities

1) To increase understanding of established operational/administrative procedures 219
2) To improve knowledge of specialized equipment 221
3) To keep informed of standards and new developments 221
4) To maintain development through job goals 221
5) To improve knowledge gleaned from reference material 216
6) To generate innovative approaches to work procedures 13
7) To apply strengths in innovation to existing products/services 14
8) To improve know-how through additional training 219
9) To capitalize on strengths in know-how by assisting others 224

10. Job Oriented Motivation

On-The-Job Development Activities

1) To minimize procrastination 17
2) To avoid boredom and develop more enthusiasm in carrying out tasks and assignments 7
3) To improve physical and emotional health 1
4) To avoid getting blocked by minor frustrations 18
5) To improve the meeting of deadlines 88
6) To set own deadlines 130
7) To increase assistance offered to others 59
8) To increase job satisfaction 30
9) To provide incentive for highly motivated employees 93
10) To more effectively utilize the highly motivated employee 94

11. Attendance and Punctuality

On-The-Job Development Activities

1) To ensure prompt arrival at work 25
2) To reduce problems caused by foreseeable absences 25
3) To avoid abusing breaks 26
4) To minimize distraction of fellow employees 26